2015

CALWEB User Manual

MANUAL NUMBER: MNL CAL-02-A ISSUE DATE: 09/07/2015

WYATT, CASSONDRA

REVISION HISTORY

Release	Description	Date
(0)	Base Revision	12-6-2006
(A)	1. Added item 11, Asset Tracking feature, in section 3.3.1 Features Summary. 2. Added “NOTE: Equipment calibration recall cycle cannot be changed and it is derived from the recall cycle interval assigned in the customer file in the system” to section 3.3.2 Features Details, 1. Asset List under Edit Asset Information. 3. Added “In the event the manufacturing model number for the added asset does not meet SSO manufacturing module number standards, the added manufacturing model number shall be changed to meet those	6-18-2007
(B)	1. Updated figure 7. 2. Added additional information to section 3.3.2 Feature Details, 2. Service History: Adding an Attachment to an Asset’s	7-20-2007
(C)	1. Replaced the figure on page 17 with a similar screenshot from CALWEB 4.0.0. 2. Added Asset’s Record Change Log in section 3.3.2	7-11-2008
(D)	Replaced logo / name of the company throughout the	10-1-2010
(E)	Replaced the screenshots with pictures of the new menu throughout the manual.	6-17-2012
(F)	Added Tek Managed Assets/Customer Managed Assets	5-22-2013
(G)	Added Calweb Start Page and Simple Asset Search	06-03-2013
(H)	Added Document Routing and Attachment Functionality	07-02-2013
(I)	Added Global Administration and Bulk PDF download	12/31/2014
(J)	Modified Calweb User Guide Layout	09/07/2015

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Contents

1. Introduction 4
2. Objective 4
3. Definitions 4
4. CALWEB Access 5
4.1 Registration 5
4.2 Login 5
4.3 User Account 6
5. CALWEB Views 7
5.1 Tek Managed Assets 7
5.1.1 Asset List 7
5.1.2 Asset Detail 9
5.1.3 Asset Edit 9
5.1.4 Audit Trail 11
5.2 Service History 11
5.3 Work in Process 12
5.4 Billing History 12
5.5 Customer Managed Assets 12
5.5.1 Asset List (CMA) 12
5.5.2 Asset Detail 14
5.5.3 Asset Edit 14
5.5.4 Audit Trail 14
5.6 Metrics 14
5.6.1 Dashboards 14
5.6.2 EIS Delivery Metrics 16
5.7 GLOBAL View 19
6. Request/Help Options 19
6.1 Request Quote 19
6.2 Request Service 19
6.3 Asset Addition 20
6.3.1 Request Asset Add – Tek Managed Assets (Gage Only) 20
6.3.2 Add International Asset 20
6.4 Customer Service 21
6.4 Report Issue/Give Feedback 22
6.5 CALWEB User Guide 22
6.6 CALWEB Version Information 22

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

6.7 CALWEB Validation Documentation 23
6.8 Lab Accreditations 25
7.0 Bulk Upload 25
7.1 Bulk Upload User Guide 25
7.2 Customer Managed Assets 25
7.3 International Tek Managed Assets 26
7.4 International Certificates 26
8.0 Configuration Management 27
8.1 Tek Managed Assets Administration 27
8.2 Service History Administration 34
8.2.1 Column Administration 34
8.2.2 Column Order Administration 35
8.3 Work in Process Administration 36
8.4 Customer Managed Asset Administration 38
8.5 Customer Administration 40
8.6 Customer Info Screen 43
8.7 Bond Customer 44
8.8 Bonded Assets 44
8.9 Bonded Assets Sync Configuration 46
8.10 Customer Special Instructions 46
9.0 Simple Asset Search 47
10.0 Document Routing 47
11.0 Attaching Documents 48

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

1. Introduction

This manual provides the user with instructions on how to access Tektronix Service Solutions CALWEB website. The manual presents CALWEB's tools to manage assets by viewing, editing, and downloading individual or groups of assets.

2. Objective

Upon reading this manual, the user shall be able to access CALWEB online and view, edit, filter, download, and share calibration information for equipment serviced by SSO. In addition, the user shall be able to create customized reports; track the process of instruments sent to SSO for service; view and/or reprint Calibration Certificates and invoices.

3. Definitions

Asset— Customer-owned equipment.

Audit trail—A secure, computer generated, time-stamped electronic record that allows reconstruction of the course of events relating to the creation, modification and deletion of an electronic record.

CALWEB—An on-line calibration management system that can be accessed through Tektronix Service Solutions website

Change Control—The processes, authorities for, and procedures to be used for all changes that are made to the computerized system and/or the system's data.

Data Edit Authorization—Only authorized personnel may change data, and both the changes and the identity of those personnel must be recorded in the audit trail.

Digital Signature—An electronic signature based upon cryptographic methods of originator authentication, computed by using a set of rules and a set of parameters such that the identity of the signer and the integrity of the data can be verified.

Electronic Record—Any information in digital form that has been created, modified, archived, or distributed by a computer.

Electronic Signature—A computer data compilation of any symbol or series of symbols, executed, adopted, or authorized by an individual to be the legally binding equivalent of the individual's handwritten signature.

SSO—Tektronix Service Solutions

Servicing Branch— The Tektronix Service Solutions lab where the customer's asset is serviced.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

4. CALWEB Access

4.1 Registration

To request a CALWEB account, go to: http://calweb.tek.com and click on the 'New User Registration' link.

Enter requested information and submit. The following items, in red text on the screen, are required.
1. Customer Number - Contact the servicing branch to obtain customer number or contact your local Tektronix Service Solutions Branch at 1-800-463-8786 or on the web at www.calibration.com
2. First Name, Last Name
3. Company Name and Address
4. Phone Number
5. Email Address
6. Create a Password
7. Password Recovery Question/Answer
8. Recall Notification
9. FDA Validation Required

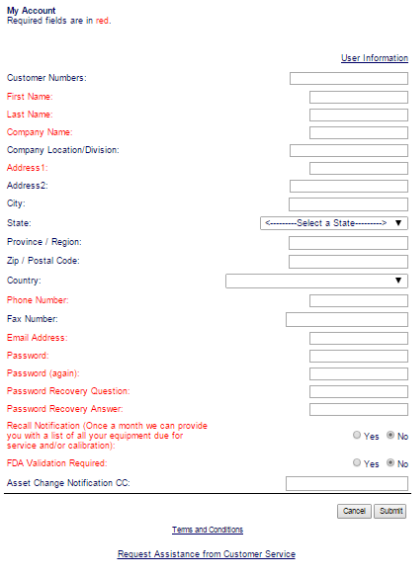


Figure 1: Calweb Registration Page

4.2 Login

To Login, go to: http://calweb.tek.com/main/login.asp

1. Enter your Username (complete email address).
2. Enter your Password.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

The CALWEB system has a Demo database that can be used to familiarize the user with CALWEB.

To access the Demo database, go to CALWEB mail login screen: http://calweb.tek.com/main/login.asp

Use the following Username and Password:
- Username: *calwebdemo@tek.com*
- Password: *Password1*

Figure 2: Calweb Login

4.3 User Account

The My Account feature enables the user to make changes to CALWEB account information such as their Default Customer Number, Name, Company Address, Password, Recovery question, Start Page and Date Format. In order to access the Asset List feature from the CALWEB menu, click on "**Account>>My Account"**. Enter the new information in the proper fields, then click on the ***Update*** button to save the changes.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

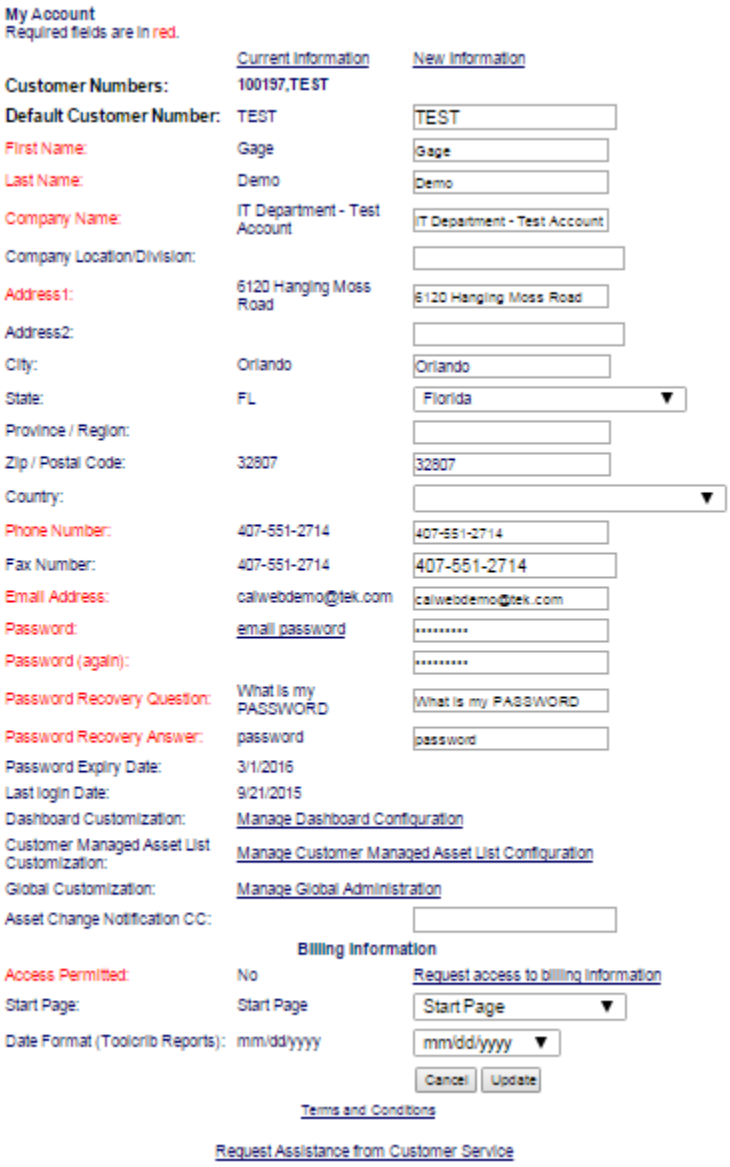


Figure 3: User Account

5. CALWEB Views

5.1 Tek Managed Assets

5.1.1 Asset List

The Tek Managed Asset List displays the customer's inventory of assets serviced by SSO, including the most recent service event for each piece of equipment. In order to access the Asset List feature from the CALWEB

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

menu, click on "**Views>>Assets>>Tek Managed Assets"**. This screen provides links to the Calibration Certificates as well as links to the asset detail. The view can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel.

Asset List Views

Users can change the view of the Asset List screen by clicking on the following links: Active, Recall, Recall, No Recall, Out of Service or ALL. These options are in parentheses at the top of the Asset List screen.

Active: The screen displays all active assets, including assets with a "No Recall" status.
Recall: The screen displays all active assets that are set up for recall notifications.
No Recall: The screen displays only assets with "No recall" status.
Out of Service: The screen displays only assets that have been removed from service.
All: The screen displays all assets belonging to the customer regardless of the status. This includes Customer Managed Assets as well.

Sort the Asset List Screen

The Asset List screen can be sorted by clicking on the column heading. For example, to sort by model number, click on "**Model #**" at the top of that column. *NOTE: The ↓ indicates that the sort is descending; ↑ indicates that the sort is ascending*.

Filter the Asset List Screen

The Asset List screen allows the user to filter the assets using several filter options:

- Drop-down: To filter using the dropddown, select an item from the list and click on the Filter button. For example: click the drop-down menu in the "**Manufacturer**" column, select a manufacturer, and click the ***Filter*** button located in the "**Sort**" column. CALWEB filters out all assets except the selected manufacturer's assets.
- Text Entry: To filter using text entry, enter the criteria into the Filter box. For example, under the word "Model #", type WD1 and click the Filter button. All assets will be filtered out except assets with model # WD1.

Viewing Calibration Certificates

Point and click on the calibration date listed in the "CAL Last" column to view the current Calibration Certificate for a specific asset. The Calibration

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

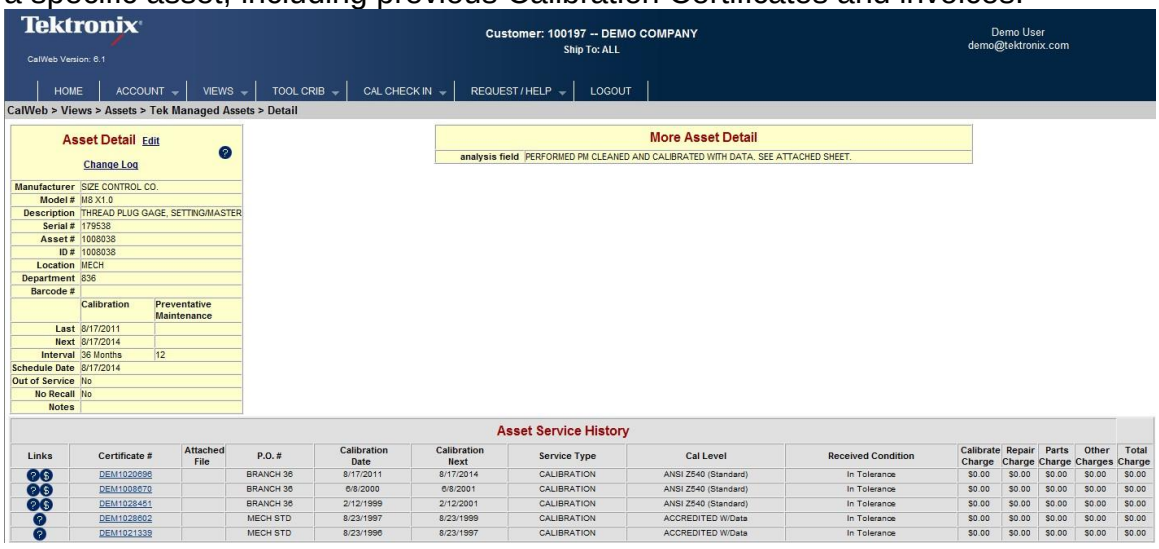
Certificate will open in an Adobe Reader (PDF) form. The certificate can be viewed, printed, or saved.

Sort	Address ID	CAL Next	CAL Last	Manufacturer	Model #	Description	Serial #	Asset #	SSO ID	Barcode	Location	Department
Filte		ALL	ALL	ALL								
	0002	6/15/2021	6/15/2011	STARR-CHEK	HREW 65.5	HARDNESS TEST BLOCK	11W21069		38-1036895	38-1036895	TIM20000	TIM
	0002	6/15/2021	6/15/2011	STARR-CHEK	HREW 60.4	HARDNESS TEST BLOCK	11W21068		38-1036894	38-1036894		
	0002	6/15/2021	6/15/2011	STARR-CHEK	HREW 92.0	HARDNESS TEST BLOCK	11W21071		38-1036893	38-1036893		
	0002	6/15/2021	6/15/2011	STARR-CHEK	HREW 74.9	HARDNESS TEST BLOCK	11WW21070		38-1036892	38-1036892	TIM	TIM
	0001	6/10/2018	6/10/2008	ROCKWELL	HARDNESS TESTER	HARDNESS TESTER	NONE	1033673	1033673	1033673	MECHANICAL	N/A
	0002	5/14/2017	5/14/2003	SERVICE PHYSICAL TES	283.6HV	HARDNESS TEST BLOCK	031405-26		38-1008299	38-1008299		
	0002	5/14/2017	5/14/2003	SERVICE PHYSICAL TES	640HV	HARDNESS TEST BLOCK	031405-53		38-1008300	38-1008300	TEST	TEST
	0001	3/24/2016	3/24/2011	MITUTOYO	500-193	CALIPER	0033816	2229	2229		ORLANDO	
	0001	9/15/2014	9/15/2011	AGILENT / HP	8970B	NOISE FIGURE METER	3446U03504	Q60555	1033990	1033990	ADDISON	RF
	0001	8/17/2014	8/17/2011	SIZE CONTROL CO.	M8 X1.0	THREAD PLUG GAGE, SETTING/MASTER	179538	1008038	1008038		MECH	836
	0001	8/15/2014	8/15/2011	VERMONT GAGE	7/8-14UNF-2A G/NG	THREADED RING GAGE	N/A	1033803	1033803	1033803	N/A	N/A
	0001	8/15/2014	8/15/2011	VERMONT GAGE	3/4-20 UNEF-2A	THREADED RING GAGE	N/A	1033804	1033804	1033804	N/A	N/A
	0001	8/5/2014	8/5/2011	VERMONT GAGE	9/16-18 UNF 2A	THREAD PLUG GAGE	N/A	1033802	1033802	1033802	N/A	N/A
	0001	8/5/2014	8/5/2011	VERMONT GAGE	1 1/8-18 UNEF-2A	THREAD PLUG GAGE	N/A	1033801	1033801	1033801	N/A	N/A
	0001	8/5/2014	8/5/2011	FLUKE	A40-5AMP	CURRENT SHUNT	3583	0992	0992	0992	N/A	N/A

Figure 4: Tek Managed Assets

5.1.2 Asset Detail

Click on an asset's manufacturer name, description or SSO ID to view the detail. The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and invoices.



Manufacturer	SIZE CONTROL CO.
Model #	M8 X1.0
Description	THREAD PLUG GAGE, SETTING/MASTER
Serial #	179538
Asset #	1008038
ID #	1008038
Location	MECH
Department	836
Barcode #	

	Calibration	Preventative Maintenance
Last	8/17/2011	
Next	8/17/2014	
Interval	36 Months	12
Schedule Date	8/17/2014	
Out of Service	No	
No Recall	No	
Notes		

Links	Certificate #	Attached File	P.O. #	Calibration Date	Calibration Next	Service Type	Cal Level	Received Condition	Calibrate Charge	Repair Charge	Parts Charge	Other Charges	Total Charge
	DEM1020696		BRANCH 36	8/17/2011	8/17/2014	CALIBRATION	ANSI Z540 (Standard)	In Tolerance	$0.00	$0.00	$0.00	$0.00	$0.00
	DEM1008670		BRANCH 36	6/8/2000	6/8/2001	CALIBRATION	ANSI Z540 (Standard)	In Tolerance	$0.00	$0.00	$0.00	$0.00	$0.00
	DEM1028451		BRANCH 36	2/12/1999	2/12/2001	CALIBRATION	ANSI Z540 (Standard)	In Tolerance	$0.00	$0.00	$0.00	$0.00	$0.00
	DEM1028602		MECH STD	8/23/1997	8/23/1999	CALIBRATION	ACCREDITED W/Data	In Tolerance	$0.00	$0.00	$0.00	$0.00	$0.00
	DEM1021339		MECH STD	8/23/1996	8/23/1997	CALIBRATION	ACCREDITED W/Data	In Tolerance	$0.00	$0.00	$0.00	$0.00	$0.00

Figure 3: Asset Detail

5.1.3 Asset Edit

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

On the Asset Detail view, click on “Edit” to navigate to the Asset Edit view. Any of the fields with a white background in the Asset Edit screen can be modified. In order to go directly to a new asset to edit, type the desired asset number and then click on “Save Changes and Edit Next Asset #”. This will save your changes and redirect you to the new asset. Otherwise, click on the ***Save*** button to save the modifications. You will then be returned to the Asset Detail screen.

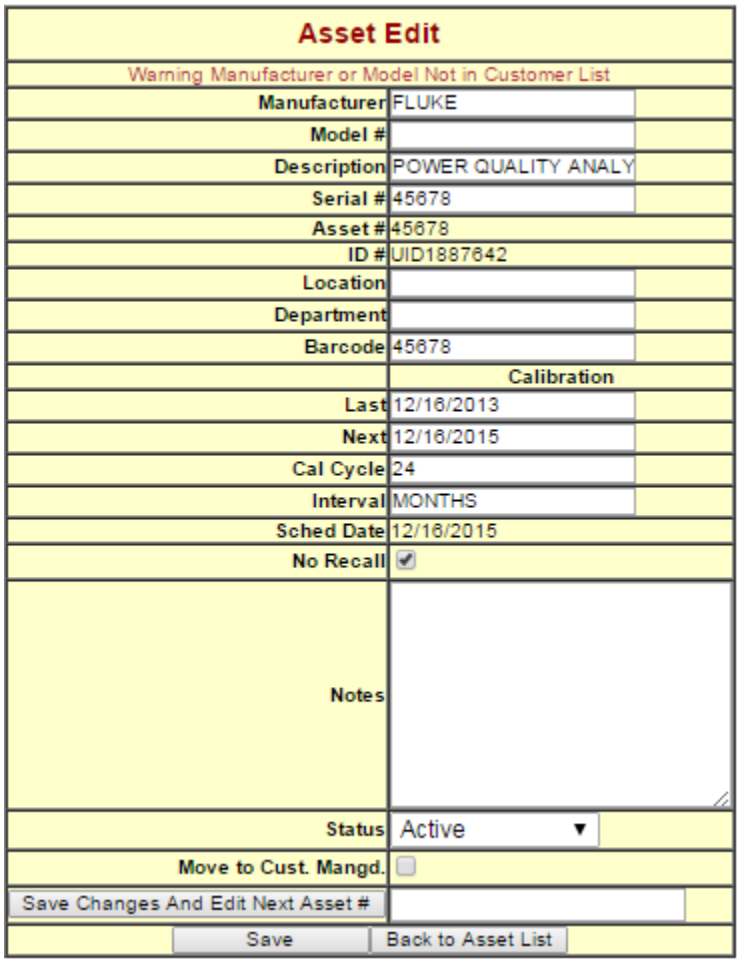


Figure 4: Asset Edit

5.1.3.1 Move to Customer Managed Assets

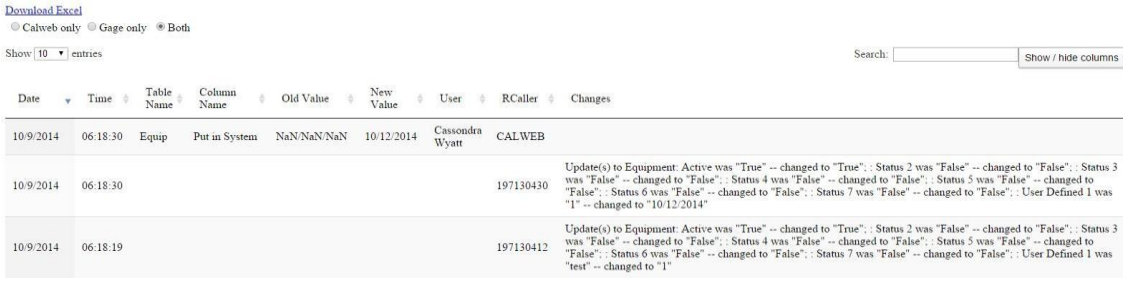
If you would like to move an asset from Tek Managed Assets to Customer Managed Assets you can do so by selecting the “Move to Cust.Mangd” checkbox. When you save the changes, the selected asset will be moved to Customer Managed Assets immediately and the current Tek Managed Asset status will be changed to “Out of Service”. Please note that this does not delete the asset from Tek Managed assets so any of the asset history

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

will remain. Also, the data transferred will only be the standard asset data. **None of the customized field data will be transferred.**

5.1.4 Audit Trail

On the Asset Detail screen click on "**Change Log**" to view a log of all of the changes and edits performed on the asset's record. The change log is sortable, filterable and may be downloaded to excel. For Gage Customers, you can select Calweb Only changes, Gage Only changes or Both, which is the default view.


Download Excel
Calweb only Gage only Both
Show 10 entries
Search: Show / hide columns

Date	Time	Table Name	Column Name	Old Value	New Value	User	RCaller	Changes
10/9/2014	06:18:30	Equip	Put in System	NaN/NaN/NaN	10/12/2014	Cassondra Wyatt	CALWEB	
10/9/2014	06:18:30						197130430	Update(s) to Equipment: Active was "True" -- changed to "True"; : Status 2 was "False" -- changed to "False"; : Status 3 was "False" -- changed to "False"; : Status 4 was "False" -- changed to "False"; : Status 5 was "False" -- changed to "False"; : Status 6 was "False" -- changed to "False"; : Status 7 was "False" -- changed to "False"; : User Defined 1 was "1" -- changed to "10/12/2014"
10/9/2014	06:18:19						197130412	Update(s) to Equipment: Active was "True" -- changed to "True"; : Status 2 was "False" -- changed to "False"; : Status 3 was "False" -- changed to "False"; : Status 4 was "False" -- changed to "False"; : Status 5 was "False" -- changed to "False"; : Status 6 was "False" -- changed to "False"; : Status 7 was "False" -- changed to "False"; : User Defined 1 was "test" -- changed to "1"

Figure 5: Audit Trail

5.2 Service History

The Service History feature provides a complete history of each asset calibrated and/or serviced by SSO. To access the Service History feature, from the CALWEB menu click on "**Views>>Events>>Service History**". The Service History screen can be sorted and filtered similarly to the Asset List screen. The user can also view Calibration Certificates and access the Asset Detail Screen.

Adding an Attachment to an Asset's Record

CALWEB users can attach documents and/or images to any of the asset records listed in the Service History screen.

To upload a file, select an asset. Click on the link in the 'Attachment' column. This will take you to a screen where you can add, edit or delete attachments based on your user rights. On the screen, click on the Browse button to add an attachment. Then, enter the description of the file. Select the file to be attached and then click on the Submit Attachment button.

To view, edit or delete the attachment, click on the attachment link included the "Attachment" column. This will show a list of all files that have been attached for that asset.

Deleting an Attachment from an Asset Record

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

A CALWEB user can remove an attached document from any of the asset records listed in the Service History screen if they have the correct permissions.

Click on the link in the 'attachment' column on Service History to take you to the 'Attachment' Screen. On the 'Attachment' screen, click on the delete button next to the file you want to delete.

Bulk PDF option

This is available in the Service History and Work in Process Screen for items that have been calibrated. Select the checkboxes for the certificates to be emailed or click on Select All to select all the certificates that are displayed on the screen. Click on the 'Send as Bulk PDF' button. An email prompt will be displayed. Enter the email address to send the certificates.

5.3 Work in Process

The Work in Process feature provides a list of all equipment currently being serviced at SSO. Status, technician notes (when applicable), and equipment movement through the calibration process are listed for each piece of equipment as it is being serviced at SSO. To access the Work in Process feature, from the CALWEB menu click on "**Views>>Events>>Work in Process"**.

The Work in Process screen can be sorted and filtered similarly to the Asset List screen. The user can also view Calibration Certificates (if the "status" reads shipped in blue), and access the Asset Detail Screen.

5.4 Billing History

The Billing feature provides current as well as historical invoicing information. To access the Billing feature from the CALWEB menu click on "**Views>>Events>>Billing History**". The Billing screen initially displays a list of all open invoices. The contents/details of an invoice can be viewed by clicking on the 'spyglass' icon in the "Filter" column next to the invoice number.

5.5 Customer Managed Assets

5.5.1 Asset List (CMA)

The Customer Managed Assets module is a feature that provides the platform for the user to add and manage non-calibrated or locally supported equipment/assets not serviced by SSO. The customer is responsible for maintaining and managing all assets not serviced by SSO that are added to the Customer Managed Assets module. The Customer Managed Assets

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

screen can be sorted or filtered to view specific information or to create custom reports to be exported to Microsoft Excel.

Asset List Views

Users can change the view of the Asset List screen by clicking on the following links: Active, Recall, Recall, No Recall, Out of Service or Active/Inactive. These options are in parentheses at the top of the Asset List screen.

Active: The screen displays all active assets, including assets with a "No Recall" status.
Recall: The screen displays all active assets that are set up for recall notifications.
No Recall: The screen displays only assets with "No recall" status.
Out of Service: The screen displays only assets that have been removed from service.
Active/Inactive: The screen displays all Customer Managed Assets regardless of the status.

Sort the Customer Managed Assets Screen

The Asset List screen can be sorted by clicking on the column heading. For example, to sort by model number, click on "Model #" at the top of that column. The list will sort in either ascending or descending order. *NOTE: The ↓ indicates that the sort is descending; ↑ indicates that the sort is ascending*.

Filter the Customer Managed Assets Screen

The Asset List screen allows the user to filter the assets using several filter options:

- Drop-down: To filter using the drop-down, select an item from the list and click on the Filter button. For example: click the drop-down menu in the "Manufacturer" column, select a manufacturer, and click the Filter button located in the "Sort" column. CALWEB filters out all assets except the selected manufacturer's assets.
- Text Entry: To filter using text entry, enter the criteria into the Filter box. For example, under the word "Model #", type WD1 and click the Filter button. All assets will be filtered out except assets with model # WD1.

Adding an Asset to Customer Managed Assets

To add an asset not serviced by SSO, click on "**Add Asset**" in the Customer Managed Assets screen. The ***ID*** field is the only required field in this area. Please enter a unique identifier for your asset. Enter date information for calibration and preventative maintenance actions in the pink shaded area or click on the calendar icon to select the dates, and then click

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

on the ***Adjust Dates*** button. Click on the ***Browse*** button to add an attachment and/or an image to the asset. Upon asset addition completion, click on the ***Save*** button to save the asset information. To clear the entered record, click on the ***Clear*** button. Click the ***Cancel*** button to return to the Customer Managed Asset List without adding the asset.

5.5.2 Asset Detail

Accessing Asset Detail

Click on an asset's hyperlinks such as CALWEB ID, Equip ID, Manufacturer, Model #, Description, Serial #, Asset #, ID, Barcode, Location or Department to view/edit its detail.

5.5.3 Asset Edit

Edit Asset Information

On the Asset Detail view, click on "Edit" to navigate to the Asset Edit view. Any of the fields with a white background in the Asset Edit screen can be modified. Upon asset editing completion, click on the ***Save*** button to save the changes. To clear the record, click on the ***Clear*** button. Click ***Cancel*** to return to the Asset Detail without saving. To delete the record, click on the ***Delete Record*** button.

5.5.3.1 Move to Tek Managed Assets

If you would like to move an asset from Customer Managed Assets to Tek Managed Assets you can do so by selecting the "Move to Tek.Mngd" checkbox. When you save the changes, an email notification will be sent to a Lab Contact to Add the Asset. The current Customer Managed Asset status will be changed to "Out of Service". Please note that this does not delete the asset from Customer Managed assets so any of the asset history will remain. Also, the data transferred will only be the standard asset data. **None of the customized field data will be transferred.**

5.5.4 Audit Trail

On the Asset Detail screen click on "**Change Log**" to view a log of all of the changes and edits performed on the asset's record. The change log is sortable and filterable.

5.6 Metrics

5.6.1 Dashboards

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

The Dashboard Screen allows a quick way for customers to view the status of their assets. The view is customizable and may include the following categories:

Asset Chart – The asset chart displays the number of assets belonging to a customer. It allows the user to see which items are compliant, Non-Compliant (overdue), No Recall, Out of Service and the Asset that are currently in Work In Process.

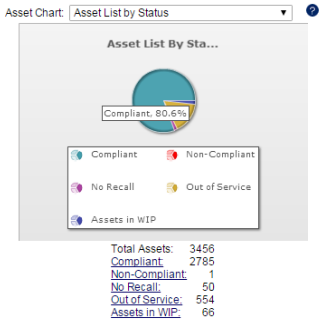
WIP Chart – This chart shows the number of assets belonging to a customer and the number that are currently in WIP. It also breaks down into categories such as Calibration, Repair and PM.

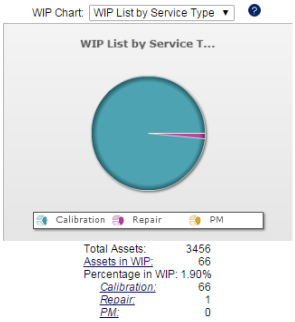
Service History Chart – This chart shows the total service events for the customer. It also shows the total OOT And Non-OOT events. The OOT events can be further broken down into the Closed, Open and Overdue Assets. These options are for customers that currently have the Service History Approval or OOT tracking features.

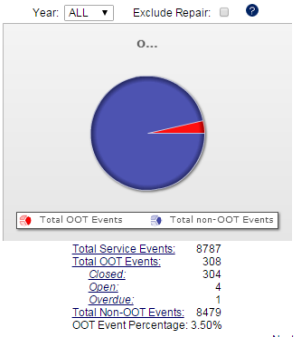
Customer Managed Assets Calibration Chart – This chart displays the current assets that are in the Customer Managed Assets and have calibration dates entered. This area shows the Compliant Cals, Non-Compliant Cals, No Recalls and Out of Service.

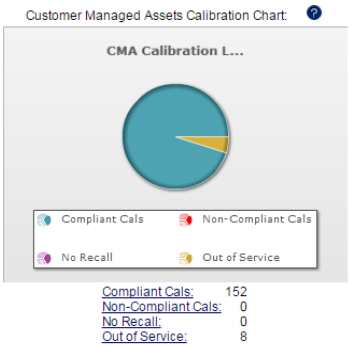
Customer Managed Assets Preventive Maintenance Chart - This chart displays the current assets that are in the Customer Managed Assets and have Preventive Maintenance dates entered. This area shows the Compliant PMs, Non-Compliant PMs, No Recalls and Out of Service.

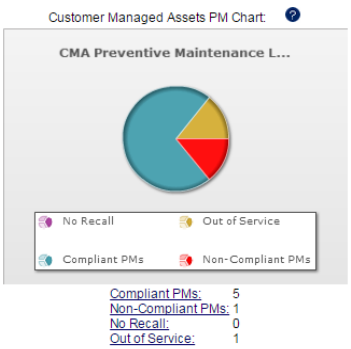
Each chart contains hyperlinks that will allow the user to go to the desired area. For example, if a user clicks on the Assets in Wip link, it will take the user to a page that will show those assets.











Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

5.6.2 EIS Delivery Metrics

5.6.2.1 EIS Setup

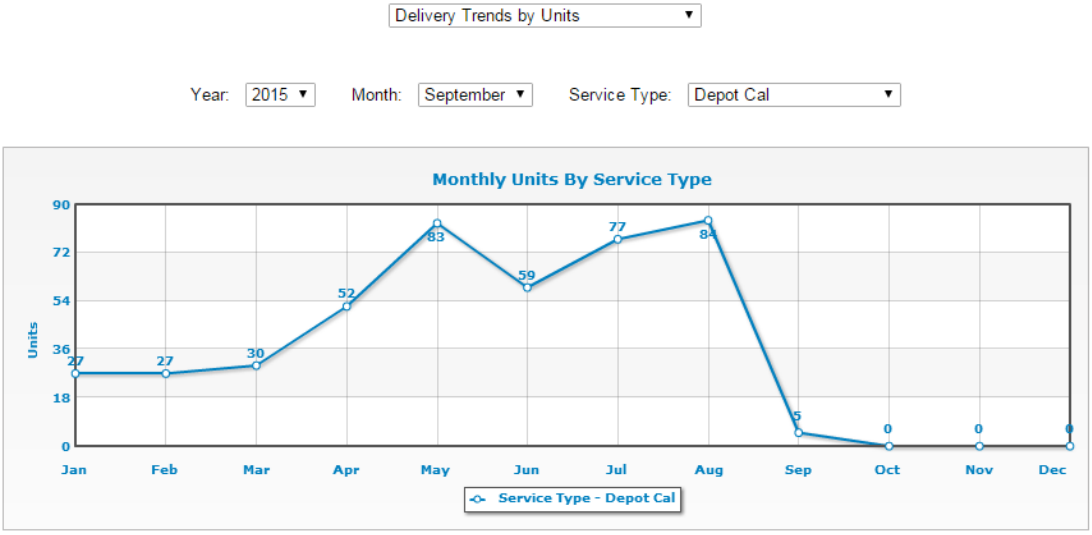
The EIS Setup Screen shows the commitment times for each service type for the customer account. You can access this screen by selecting Views>>Metrics>>EIS Delivery Metrics Setup

EIS Commitment Times	
Depot Cal	5
Outside Services(OSS) Cal	25
Outside Services(OSS) Repair	25
Transfer Cal	10
Temporary Onsite	2
Regional Transfer Cal	5
Repair	20
Preventive Maintenance	2

5.6.2.2 EIS Delivery Dashboard

5.6.2.2.1 Units Graph

This screen shows the number of units each month per service type. You can change the year, month and service type using the dropdown. You can access this screen by selecting Views>>Metrics>>EIS Delivery Dashboard.



5.6.2.2.2 Units Grid

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

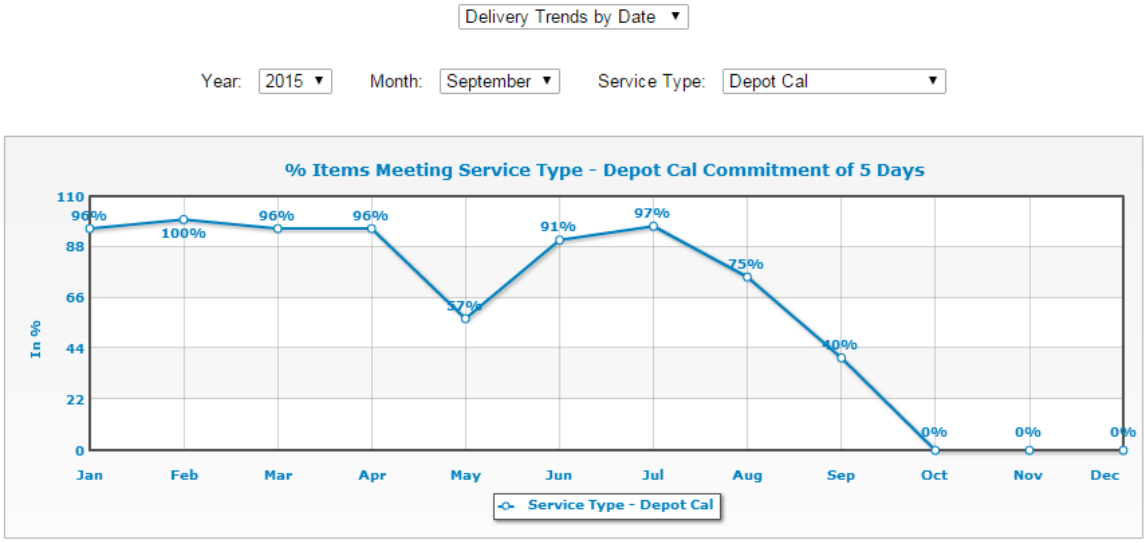
This screen shows the number of units each month per service type. You can change the year, month and service type using the dropdowns. The grid shows a breakdown of each asset and can be downloaded to excel.

Depot Cal Breakdown For September 2015

	Service Type	Cert #	Manufacturer	Model #	Description	Serial #	SSO ID	Asset #
1	DEPOT CAL	10381146	VERMONT GAGE	.154 INCH	PIN GAGE	NA	UID3031384	903315041
2	DEPOT CAL	10384907	DELTRONIC	.0790-.0795	PLUG GAGE SET .0790-.0795	N/A	UID2208912	903315766
3	DEPOT CAL	10384944	DELTRONIC	.0810-.0820	PLUG GAGE SET .0810-.0820	GP-00365	UID2208914	903315768
4	DEPOT CAL	10384799	DELTRONIC	0.0790/0.07950	PLUG GAGE SET .0790-.0795	N/A	UID2208916	903315770
5	DEPOT CAL	10387228	MOUNTZ	T8N10	TORQUE WRENCH	1MJ060578	UID2209446	903314715

5.6.2.2.3 Delivery Graph

This screen shows the percentage of units each month meeting the commitment time by service type. You can change the year, month and service type using the dropdown. You can access this screen by selecting Views>>Metrics>>EIS Delivery Dashboard and then selecting Delivery Trends by Date in the dropdown.



5.6.2.2.4 Delivery Grid

This screen shows the percentage of units each month meeting the commitment time by service type. You can change the year, month and service type using the dropdown. You can access this screen by selecting Views>>Metrics>>EIS Delivery Dashboard and then selecting Delivery Trends by Date in the dropdown. . The grid shows a breakdown of each asset and can be downloaded to excel.

• - Within Turntime , • - Not Within Turntime

Depot Cal Turntime Breakdown For September 2015

CalType	Location	Department	Received	Returned	Received Date	Shipped Date	Calibration Time (Days)
Calibration	SOSC	0340003	IN TOLERANCE	IN TOLERANCE	8/28/2015	9/3/2015	4
Calibration	MACHINE SHOP CENTRIFUGE	0110032	OUT OF TOLERANCE	IN TOLERANCE	8/17/2015	9/2/2015	6
Calibration	MACHINE SHOP CENTRIFUGE	0110032	OUT OF TOLERANCE	IN TOLERANCE	8/17/2015	9/2/2015	6
Calibration	MACHINE SHOP CENTRIFUGE	0110032	OUT OF TOLERANCE	IN TOLERANCE	8/17/2015	9/2/2015	6
Calibration	PLASTICS	0113700	IN TOLERANCE	IN TOLERANCE	8/28/2015	9/1/2015	2

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

5.6.2.3 EIS Delivery Metrics

5.6.2.3.1 Delivery Metrics Unit Display

This screen shows the number of units each month per service type. You can change the year and the category using the dropdown. You can access this screen by selecting Views>>Metrics>>EIS Delivery Metrics. To see the turnaround times for each service type, click on the category name. The summary can be downloaded to excel.

Year: 2015
Category: ALL
Submit

Service Delivery Summary Calendar Year - 2015													
Delivery	January	February	March	April	May	June	July	August	September	October	November	December	Total
Depot Cal	4	3	1	0	5	0	1	0	0	0	0	0	14
OSS Cal	75	2	0	97	17	0	3	66	1	0	0	0	261
OSS Repair	0	0	0	0	0	0	0	0	0	0	0	0	0
Transfer Cal	1	1	0	0	9	0	0	1	4	0	0	0	16
Temporary Onsite	34	0	87	0	0	0	45	6	0	0	0	0	172
Repair	0	0	0	0	0	0	0	0	0	0	0	0	0
Regional Transfer Cal	0	0	0	0	0	0	0	0	0	0	0	0	0
PM	0	0	0	0	0	0	0	0	0	0	0	0	0

Download Excel Spreadsheet

5.6.2.3.2 Delivery Metrics Summary Page

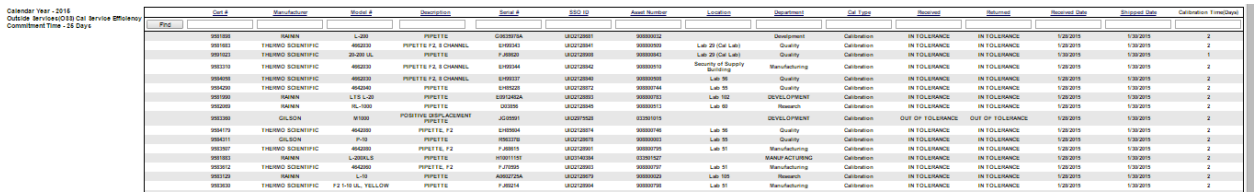
This screen shows the number of units serviced as well as the average turnaround time and items meeting commitment time. It also show the items not meeting commitment time and the on time percentage. This information can be downloaded to excel. Click on the month or ytd to view a breakdown of assets.

Calendar Year - 2015 Outside Services(OSS) Cal Service Efficiency Commitment Time - 25 Days					
Month	# of Instruments	AVG T-Time	# Items Meeting Commitment Time	# Items Not Meeting Commitment Time	% Items Meeting Commitment
January	75	1.10	75	0	100
February	2	57	1	1	50
March	0	0	0	0	0
April	97	7.4	95	2	97.9
May	17	44.2	0	17	0
June	0	0	0	0	0
July	3	35.7	1	2	33.3
August	66	17.6	65	1	98.4
September	1	31	0	1	0
October	0	0	0	0	0
November	0	0	0	0	0
December	0	0	0	0	0
YTD	261	11.6	237	24	90.8

5.6.2.3.3 Delivery Metrics Service Breakdown

This screen shows the units serviced during the time selected. This information can be downloaded to excel.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



5.7 GLOBAL View

The global view allows users to create and view a customized multi-customer account view. In order to administer the view, navigate to 'My Account' and select 'Manage Global Administration'.
Select from multiple links to customize the view.
Manage Customers *– allows you to choose which customers you would like to include in your view.*
Manage Standard Columns *– allows you to choose which standard columns you would like to include in your view.*
Manage Standard Columns Excel Download*– allows you to choose which standard columns you would like to download to excel.*
Manage Custom Columns *– allows you to choose which custom columns you would like to include in your view.*
Manage Custom Columns Excel Download*– allows you to choose which custom columns you would like to download to excel.*

After you have selected these options, the Global view in Tek Managed Assets will then display according to your configuration.

6. Request/Help Options

6.1 Request Quote

The Request Quote feature enables the user to request a calibration and/or repair quote by completing specific fields on the Request Quote CALWEB screen. To access the Request Quote feature, from the CALWEB menu, click on **"Request/Help>>Request Quote**".

Enter the equipment to be calibrated and/or repaired, contact information, and any comments. A document can also be attached, if desired. Click on the ***Submit Quotation Request*** button. The request is e-mailed to the SSO servicing branch.

6.2 Request Service

The Request Service feature allows a user to select items to be serviced and create a packing slip.

Sorting the Request Service Screen

The Request Service screen can be sorted by clicking on the column heading. For example, to sort by model number, click on "Model #" at the

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

top of that column. The list will sort in either ascending or descending order. *NOTE: The ↓ indicates that the sort is descending; ↑ indicates that the sort is ascending*.

Filtering the Request Service Screen

The Request Service screen allows the user to filter the assets using text entry. To filter using text entry, enter the criteria into the Filter box. For example, under the word "Model #", type WD1 and click the Filter button. All assets will be filtered out except assets with model # WD1.

6.3 Asset Addition

6.3.1 Request Asset Add – Tek Managed Assets (Gage Only)

The Add Asset feature enables the user to add a piece of equipment to his/her asset list. To access the Add Asset feature click on **"Request/Help>>Request Asset Add".**

Complete the required fields and click on the ***Submit Request*** button. The information is e- mailed to the SSO servicing branch.

The customer may also have a customized 'Add Asset' screen. Calweb can display customized fields or a link to a template can be provided.

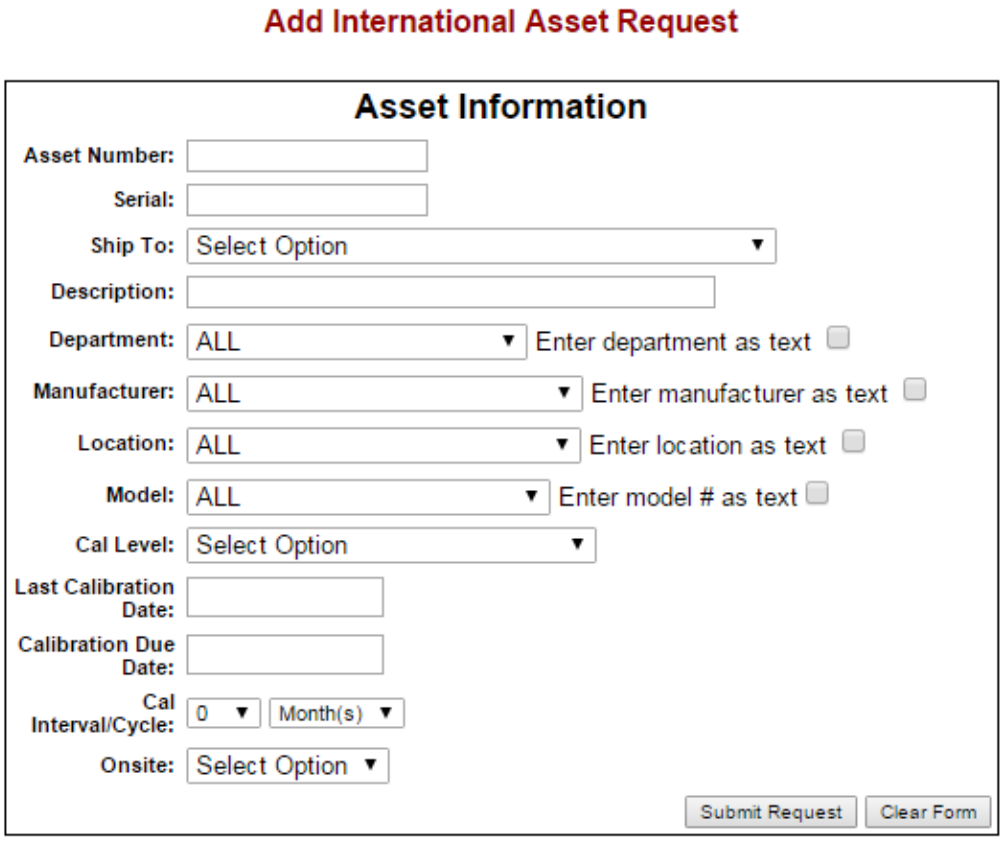
NOTE: fields labeled in red are required fields.

Upon receipt of an Add Asset Request, the request is activated by the SSO servicing branch. In the event that the manufacturer and model number for the added asset does not meet the SSO standards, the added model number shall be changed to meet those standards.

6.3.2 Add International Asset

This area allows international users to add assets directly into the CALWEB database. The user will fill out the fields in the form and click on the Submit Request button and the asset will be added immediately. The Department, Manufacturer, Location and Model fields may all be selected from a dropdown or can be entered as text by selecting the corresponding 'Enter as Text' checkbox.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



6.4 Customer Service

The Customer Service feature provides information and links to various SSO departments/personnel. The user can either call or email questions/concerns to the appropriate SSO contacts. To access the Customer Service feature from the CALWEB menu, click on **"Request/Help>>Customer Service".**

National Customer Service
(800) 833-9200
(800) 438-8165
Customer Service

Accounts Receivable
(800) 833-9200
(800) 438-8165
AR Customer Service

Quality Department
(800) 833-9200
(800) 438-8165
Quality Department

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

6.4 Report Issue/Give Feedback

This area allows users to submit an issue to the SSO-IT group.

6.5 CALWEB User Guide

The Calweb User Guide gives users a guide to the most widely used Calweb functionality. It is viewable by navigating to Request/Help >> Calweb User Guide.

6.6 CALWEB Version Information

The Version information link allows users to view all of the Calweb Modifications done in each release. It includes the Install Date, the Calweb Version and a description of the modifications. It is viewable by navigating to Request/Help >> Version Information.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Install Date	CALWEB Version	CALWEB Version - Description of Modifications
9/8/2015	9.9	**EIS Delivery Dashboard** a) A new Delivery Dashboard has been added to allow users to view the EIS service metrics for their customer.
		Enhance Tek Managed Detail to Detect Bonded Assets a) An icon has been added in the left most column to indicate whether or not the asset is bonded.
		Add Interactive Help Topics on CALWEB Start Page a) Current and previous release notes are now available on the Calweb Start Page.
		Create UI for Email Sent Log a) A new UI has been added to view an email log for all notifications sent from CALWEB.
		Enhance Form Validation on Asset Edit Screen a) The Asset Edit Screen now has date validation to ensure that valid dates are submitted for standard and custom date fields.
		Enhance Audit Trail Update for Increased Precision a) An error handling mechanism has been added to check the asset edit updated correctly before adding audit log and send update emails.

6.7 CALWEB Validation Documentation

The Validation Documentation page contains a list of links for each Calweb version. Each link will take you to the validation documentation for the release including the description, test plan, system requirements, etc. It is viewable by navigating to Request/Help >> Version Information.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Validation Documents

3.3.pdf
4.0.pdf
4.1.pdf
4.2.pdf
4.3.pdf
4.4.pdf
4.5.pdf
4.6.pdf
4.7.pdf
4.8.pdf
4.9.pdf
5.0.pdf
5.1.pdf
5.2.pdf
6.0 - Validation Summary.pdf
6.1 - Validation Summary.pdf
6.2 - Validation Summary.pdf
6.3 - Validation Summary.pdf
6.4 - Validation Summary.pdf
6.5 - Validation Summary.pdf
6.6 - Validation Summary.pdf
6.7 - Validation Summary.pdf
6.8 - Validation Summary.pdf
6.9 - Validation Summary.pdf
7.0 - Validation Summary.pdf
7.1 - Validation Summary.pdf
7.2 - Validation Summary.pdf
7.3 - Validation Summary.pdf
7.4 - Validation Summary.pdf

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Software validation has been completed on Version 9.9 and previous production (i.e., customer accessible) versions of the electronic calibration management system known as CALWEB.

The validation was done to meet the FDA Requirements of 21CFR Part 11 and 21CFR820.

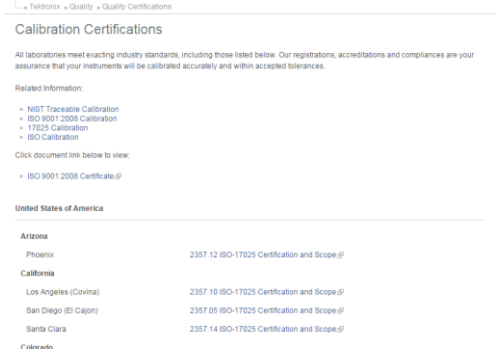
The validation of CALWEB is complete and CALWEB Version 9.9 is suitable for its intended use; it has been demonstrated that the software complies with documented requirements. The demonstration is supported by objective evidence that all user and functional needs (i.e., the intended use of the system) have been met.

Summary of Validation Activity *(version validation dates)*

9.9	Sept 8, 2015
9.8	August 11, 2015
9.7	July 7, 2015
9.6	June 2, 2015

6.8 Lab Accreditations

This link redirects the user to the Tektronix Calibration Certification page. It is viewable by navigating to Request/Help >> Lab Accreditations.


Calibration Certifications

All laboratories meet exacting industry standards, including those listed below. Our registrations, accreditations and compliances are your assurance that your instruments will be calibrated accurately and within accepted tolerances.

Related Information:

- NIST Traceable Calibration
- ISO 9001:2008 Calibration
- 17025 Calibration
- ISO Calibration

Click document link below to view:

- ISO 9001:2008 Certificate

United States of America

Arizona
Phoenix — 2357.12 ISO-17025 Certification and Scope

California
Los Angeles (Covina) — 2357.10 ISO-17025 Certification and Scope
San Diego (El Cajon) — 2357.05 ISO-17025 Certification and Scope
Santa Clara — 2357.14 ISO-17025 Certification and Scope

Colorado

7.0 Bulk Upload

7.1 Bulk Upload User Guide

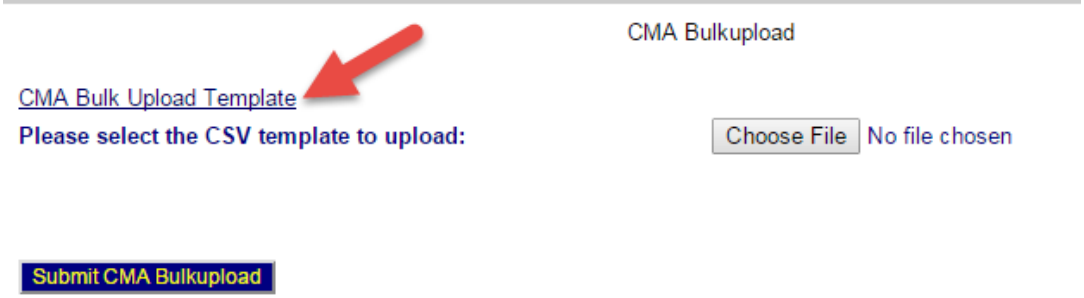
The Bulk Upload User Guide is a document that provides information regarding the three options for Bulk Upload. It is viewable by navigating to Bulk Upload >> Bulk Upload User Guide.

7.2 Customer Managed Assets

The CMA Bulk Upload Template allows a user to add a group of assets to Customer Managed Assets. A template for the assets called CMA Bulk Upload Template is displayed on the page.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

The file should be downloaded, filled out and saved as a Comma Separated Value (.csv) file. Once the file has been saved, the user should click on the Choose File Button and select the saved file. The user will then click on the Submit CMA Bulk Upload button. The assets will be added into the Customer Managed Asset list and viewable within a few minutes.



Example of a template file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Customer	Equip ID	Cal Last	Cal Next	Cal Cycle	Cal Interv	PM Last	PM Next	PM Cycle	PM Interv	Manufact	Model Nu	Descriptic	Serial Nur	Asset Nur	ID	Barcode	Location	Departme	No Recall
2																				
3																				
4																				
5																				
6																				

7.3 International Tek Managed Assets

The International Tek Managed Asset Bulk Upload Template allows a user to add a group of assets to the Tek Managed Assets. A template for the assets called TMA Bulk Upload Template is displayed on the page. The file should be downloaded, filled out and saved as a Comma Separated Value (.csv) file. Once the file has been saved, the user should click on the Choose File Button and select the saved file. The user will then click on the Submit TMA Bulk Upload button. The assets will be added into the Tek Managed Asset list and viewable within a few minutes. It should be noted that this option is only available for international customers.

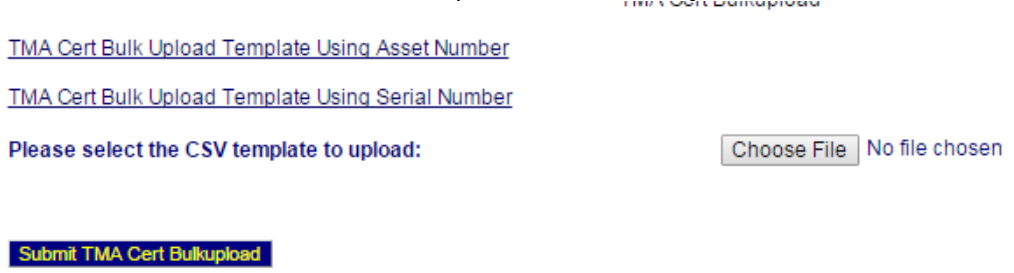
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Customer	Shipto ID	CAL Next	CAL Last	Manufact	Model Nu	Descriptic	Serial Nur	Asset Nur	Barcode	Location	Departme	Inhouse	Cal Level	Cal Cycle	Cal Interv	PM Last	PM Next	PM Cycle	PM Interv
2																				
3																				
4																				
5																				

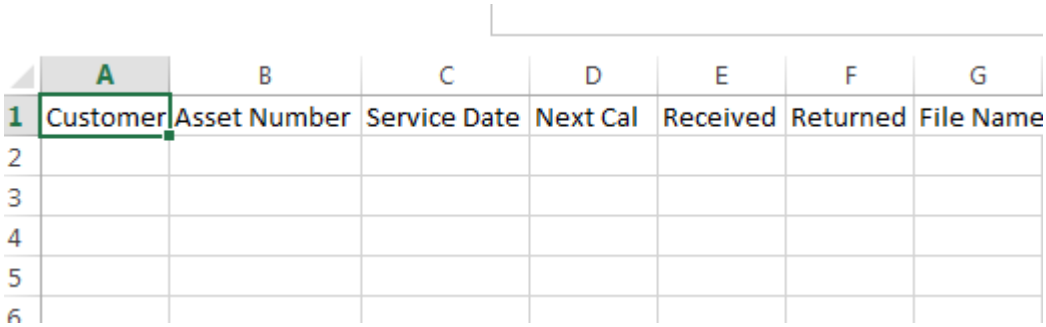
7.4 International Certificates

The International Certificate Bulk Upload Template allows a user to add a group of assets and certificates to their Service History. The first step that should be taken in this process is to contact

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

a member of the SSO IT group so arrangements can be made for the PDF File Transfer. This can be done using the Request/Help>>Report Issue/Give Feedback option in Calweb. Once the PDFs have been transferred, you may navigate to the Bulk Upload screen to complete the process. There are two templates for the assets displayed on the page. One called TMA Cert Bulk Upload Template Using Asset Number and one called TMA Cert Bulk Upload Template Using Serial Number. The user should select the template based upon which field is used to identify the customer assets. The appropriate file should then be downloaded, filled out and saved as a Comma Separated Value (.csv) file. Once the file has been saved, the user should click on the Choose File Button and select the saved file. The user will then click on the Submit TMA Cert Bulk Upload button. The assets will be added into the Service History list and viewable within a few minutes. It should be noted that this option is only available for international customers. Please note that the File Name is a requirement to correctly view the certificates.


TMA Cert Bulk Upload Template Using Asset Number
TMA Cert Bulk Upload Template Using Serial Number
Please select the CSV template to upload:
Choose File
No file chosen
Submit TMA Cert Bulkupload



	A	B	C	D	E	F	G
1	Customer	Asset Number	Service Date	Next Cal	Received	Returned	File Name
2							
3							
4							
5							
6							

8.0 Configuration Management

8.1 Tek Managed Assets Administration

8.1.1 Column Administration

The Tek Managed Assets Column Administration Screen allows a user to determine the names of the columns, whether the columns should be displayed on the screen, in the excel download and on the asset detail screen. It also allows the user to determine whether the field should have a filter in the Tek Managed Assets screen. The user should determine the configuration and then click on Update Columns. If the user wants the page to display the default view they should click on the Reset to Standard Columns.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Tek Managed Assets Column Administration

*column displayed only for billing contacts/admins

Update Columns | Reset to Standard Columns

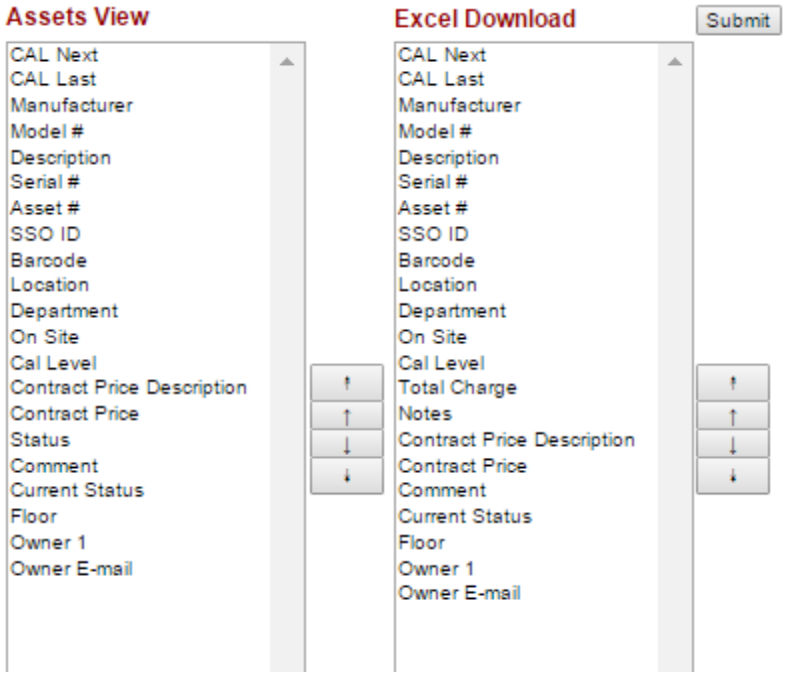
Default Column Value	Current Column Name	Filterable	Display	Excel Download	Asset Detail Display
gage_sn	Asset #	☑	Required	Required	☑
current_gage_condition	Barcode	☑	☑	☑	☑
calibdate	CAL Last	☑	☑	☑	☑
custom_field2	Cal Level	☑	☑	☑	☐
calibnext	CAL Next	☑	Required	Required	☑
customtext2	Calib By	☐	☐	☐	☐
Comment	Comment	☑	☑	☑	☑
line_cost*	Contract Price	☐	☑	☑	☐
line_costDetail*	Contract Price Description	☐	☑	☑	☐
event_status	Current Status	☑	☑	☑	☑
department	Department	☑	☑	☑	☑
gage_descr	Description	☑	☑	☑	☑
bin_number	Floor	☑	☑	☑	☑
crib_number	Location	☑	☑	☑	☑
manufacturer	Manufacturer	☑	☑	☑	☑
model_num	Model #	☑	☑	☑	☑
gage_notes	Notes	☐	☐	☑	☑
inhouse	On Site	☑	☑	☑	☐
gage_owner	Owner 1	☑	☑	☑	☑
CustomText3	Owner E-mail	☑	☑	☑	☑
customtext1	Program	☐	☐	☐	☐
gage_id	Serial #	☑	☑	☑	☑
syprisid	SSO ID	☑	☑	☑	☐
event_status_label	Status	☑	☑	☐	☑
totalchrg*	Total Charge	☐	☐	☑	☐

Update Columns | Reset to Standard Columns

8.1.2 Column Order Administration

The Column Order Administration page will show as an option after the Tek Managed Asset List has been customized. This screen will allow a user to change the order of the columns in the Tek Managed Asset Screen and the Download to excel using navigation arrows. Once the order has been established, the Submit button should be clicked to update the column order.

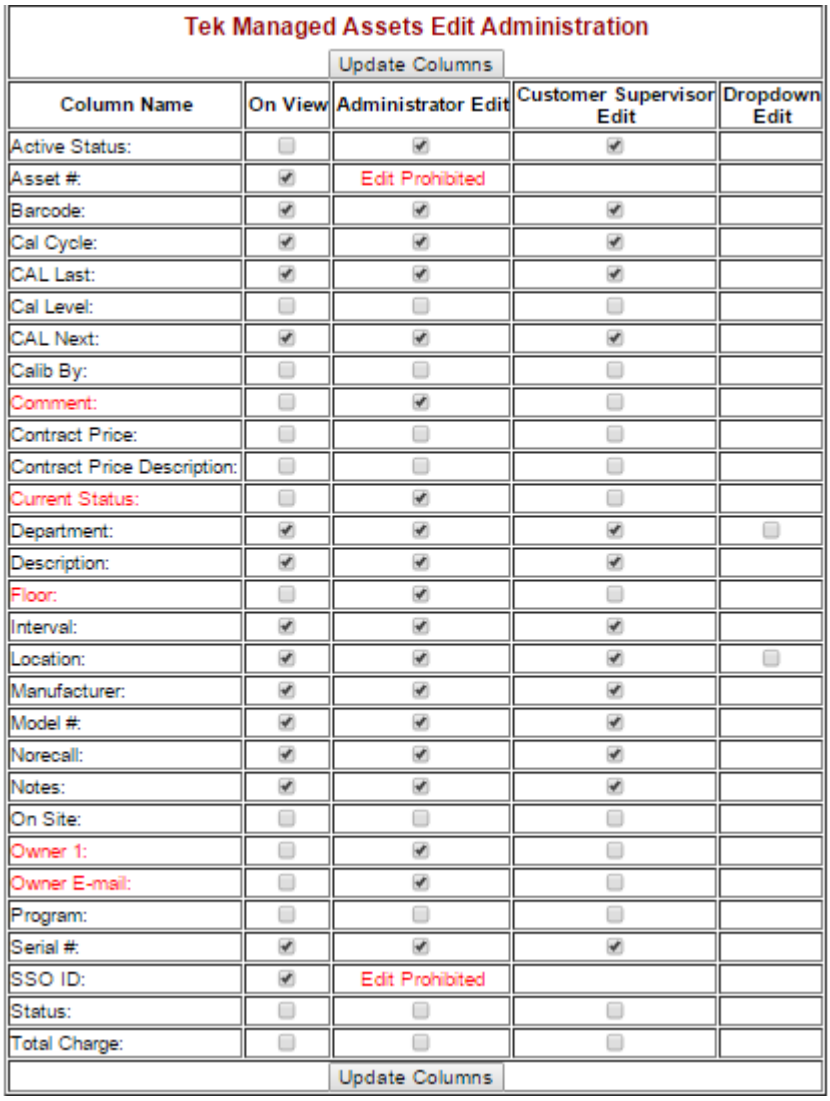
Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.1.3 Edit Administration

The Edit Administration screen allows the user to customize the Tek Managed Assets Edit screen. The user can select which fields will be on the view and whether the input type is text or dropdown for select fields. The user can also select whether the fields are editable by 'Customer Supervisor' users and 'Customer Administrator' users. Some fields are prohibited to edit and are not available to edit but can still be selected/unselected for the view.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



Tek Managed Assets Edit Administration

Update Columns

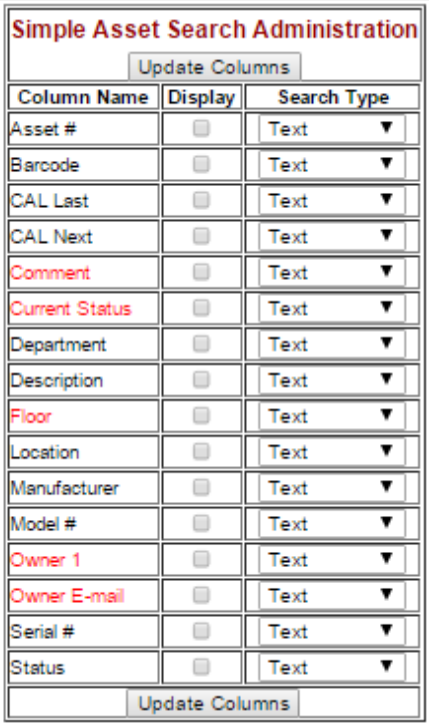
Column Name	On View	Administrator Edit	Customer Supervisor Edit	Dropdown Edit
Active Status:	☐	☑	☑	
Asset #:	☑	Edit Prohibited		
Barcode:	☑	☑	☑	
Cal Cycle:	☑	☑	☑	
CAL Last:	☑	☑	☑	
Cal Level:	☐	☐	☐	
CAL Next:	☑	☑	☑	
Calib By:	☐	☐	☐	
Comment:	☐	☑	☐	
Contract Price:	☐	☐	☐	
Contract Price Description:	☐	☐	☐	
Current Status:	☐	☑	☐	
Department:	☑	☑	☑	☐
Description:	☑	☑	☑	
Floor:	☐	☑	☐	
Interval:	☑	☑	☑	
Location:	☑	☑	☑	☐
Manufacturer:	☑	☑	☑	
Model #:	☑	☑	☑	
Norecall:	☑	☑	☑	
Notes:	☑	☑	☑	
On Site:	☐	☐	☐	
Owner 1:	☐	☑	☐	
Owner E-mail:	☐	☑	☐	
Program:	☐	☐	☐	
Serial #:	☑	☑	☑	
SSO ID:	☑	Edit Prohibited		
Status:	☐	☐	☐	
Total Charge:	☐	☐	☐	

Update Columns

8.1.4 Simple Asset Search Administration

The Simple Asset Search Administration allows the user to determine which columns will show up on the Simple Asset Search for their customer. They can also choose whether the input type will be text or a dropdown. Some comment fields are unavailable for the dropdown input.

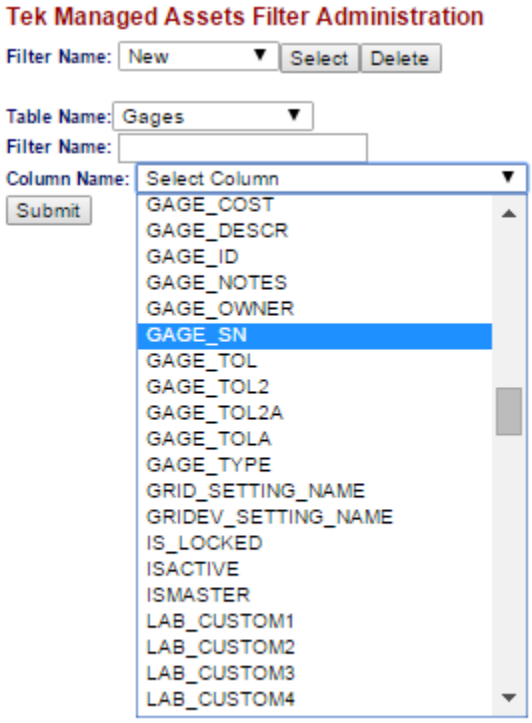
Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.1.5 View Filter Administration

The View Filter Administration area allows a filter to be created to limit the assets viewed by a user based upon a certain value. It is available for the asset views including Tek Managed Assets, Service History, WIP and Request Service. The View Filter Administration area also allows existing filters to be modified. The table name should be selected and then a list of fields will be displayed in the Column Name dropdown. The Filter Name should then be entered. The filter will be created when the Submit button is clicked. After the Filter has been created, it will be available in the Tek Managed Asset View Filter Administration area of the customer's user accounts.

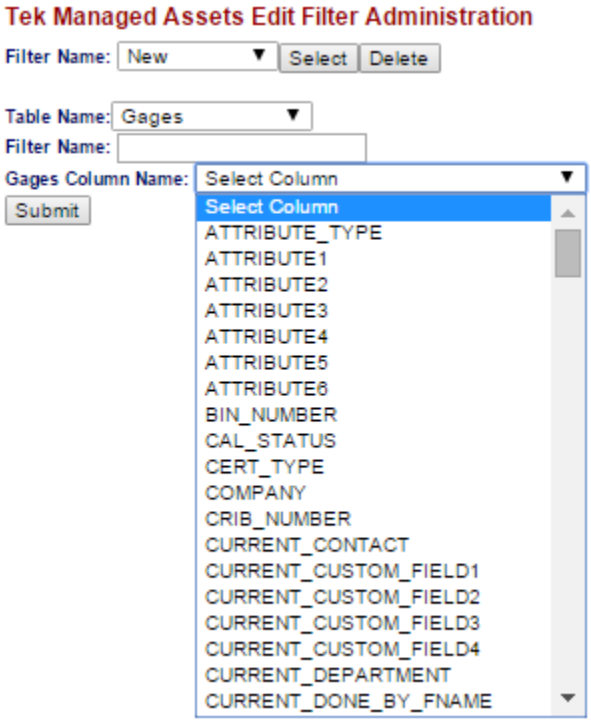
Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.1.6 Edit Filter Administration

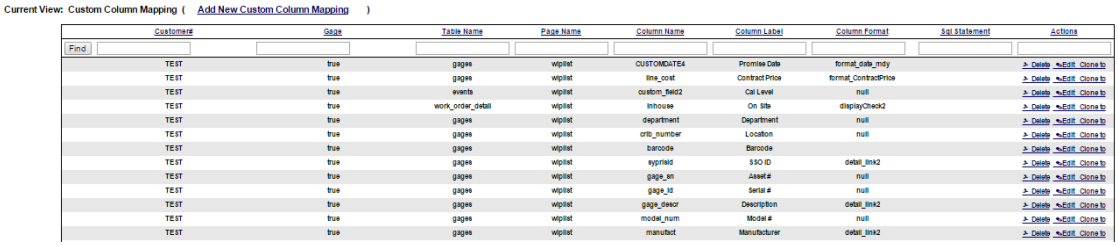
The Edit Filter Administration area allows a filter to be created to limit the assets editable by a user based upon a certain value. The Edit Filter Administration area also allows existing filters to be modified. The table name should be selected and then a list of fields will be displayed in the Column Name dropdown. The Filter Name should then be entered. The filter will be created when the Submit button is clicked. After the Filter has been created, it will be available in the Tek Managed Asset Edit Filter Administration area of the customer's user accounts.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

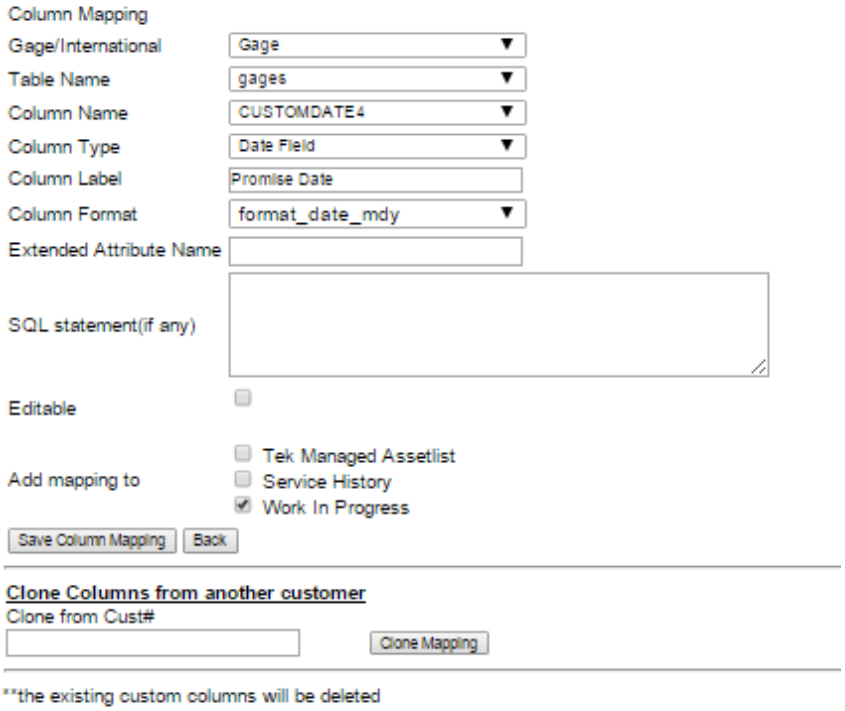


8.1.7 Custom Column Mapping

The Custom Column Mapping area allows a user to create a column for the Tek Managed Asset, Service History and WIP views. It also allows a user to edit the column or delete it. The column is mapped using the table name and database field name. It can be added to all three views and may also be selected for edit. The clone to customer option will allow this field to be added to another customer as well.


Current View: Custom Column Mapping (Add New Custom Column Mapping)
Customerid
Gage
Table Name
Page Name
Column Name
Column Label
Column Format
Sql Statement
Actions
Find
TEST true gages wiplist CUSTOMDATE4 Promise Date format_date_mdy
TEST true gages wiplist line_cost Contract Price format_ContractPrice
TEST true events wiplist custom_field2 Cal Level null
TEST true work_order_detail wiplist inhouse On Site displayCheck2
TEST true gages wiplist department Department null
TEST true gages wiplist crib_number Location null
TEST true gages wiplist barcode Barcode
TEST true gages wiplist sysprisid SSO ID detail_link2
TEST true gages wiplist gage_sn Asset # null
TEST true gages wiplist gage_id Serial # null
TEST true gages wiplist gage_descr Description detail_link2
TEST true gages wiplist model_num Model # null
TEST true gages wiplist manufact Manufacturer detail_link2
Delete Edit Clone to

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

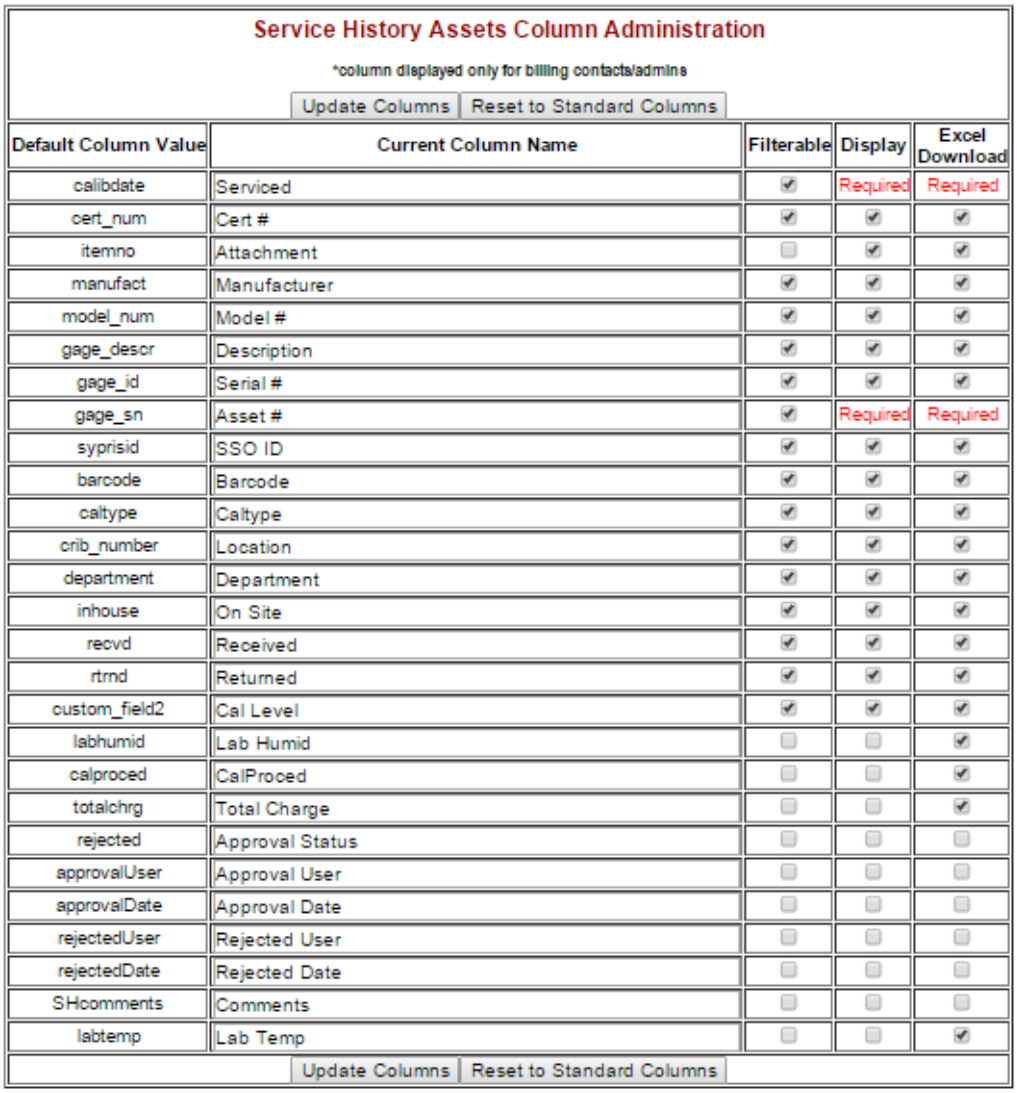


8.2 Service History Administration

8.2.1 Column Administration

The Service History Column Administration Screen allows a user to determine the names of the columns, and whether the columns should be displayed on the screen and in the excel download. It also allows the user to determine whether the field should have a filter in the Service History screen. The user should determine the configuration and then click on Update Columns. If the user wants the page to display the default view they should click on the Reset to Standard Columns.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



Service History Assets Column Administration

*column displayed only for billing contacts/admins

Update Columns | Reset to Standard Columns

Default Column Value	Current Column Name	Filterable	Display	Excel Download
calibdate	Serviced	☑	Required	Required
cert_num	Cert #	☑	☑	☑
itemno	Attachment	☐	☑	☑
manufact	Manufacturer	☑	☑	☑
model_num	Model #	☑	☑	☑
gage_descr	Description	☑	☑	☑
gage_id	Serial #	☑	☑	☑
gage_sn	Asset #	☑	Required	Required
syprisid	SSO ID	☑	☑	☑
barcode	Barcode	☑	☑	☑
caltype	Caltype	☑	☑	☑
crib_number	Location	☑	☑	☑
department	Department	☑	☑	☑
inhouse	On Site	☑	☑	☑
recvd	Received	☑	☑	☑
rtrnd	Returned	☑	☑	☑
custom_field2	Cal Level	☑	☑	☑
labhumid	Lab Humid	☐	☐	☑
calproced	CalProced	☐	☐	☑
totalchrg	Total Charge	☐	☐	☑
rejected	Approval Status	☐	☐	☐
approvalUser	Approval User	☐	☐	☐
approvalDate	Approval Date	☐	☐	☐
rejectedUser	Rejected User	☐	☐	☐
rejectedDate	Rejected Date	☐	☐	☐
SHcomments	Comments	☐	☐	☐
labtemp	Lab Temp	☐	☐	☑

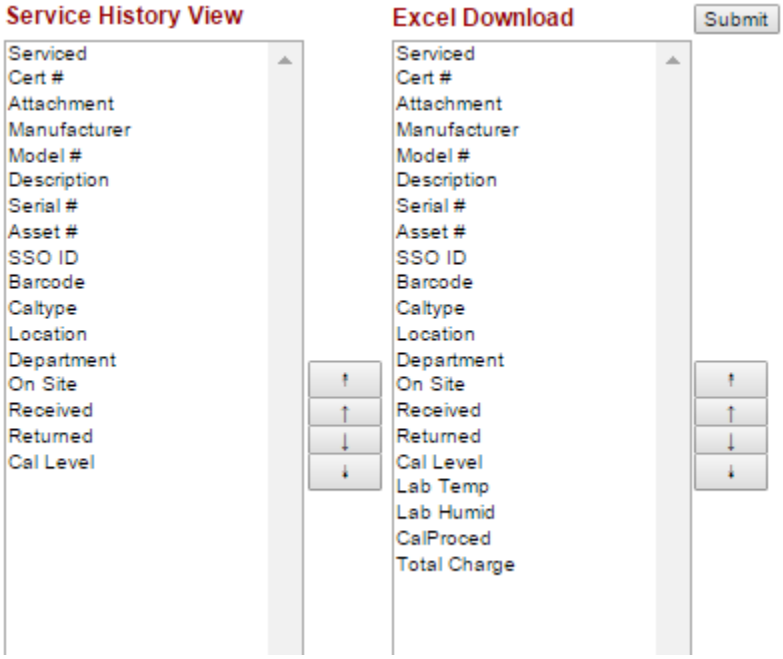
Update Columns | Reset to Standard Columns

8.2.2 Column Order Administration

The Column Order Administration page will show as an option after the Service History List has been customized. This screen will allow a user to change the order of the columns in the Service History Screen and the Download to Excel using navigation arrows. Once the order has been

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

established, the Submit button should be clicked to update the column order.

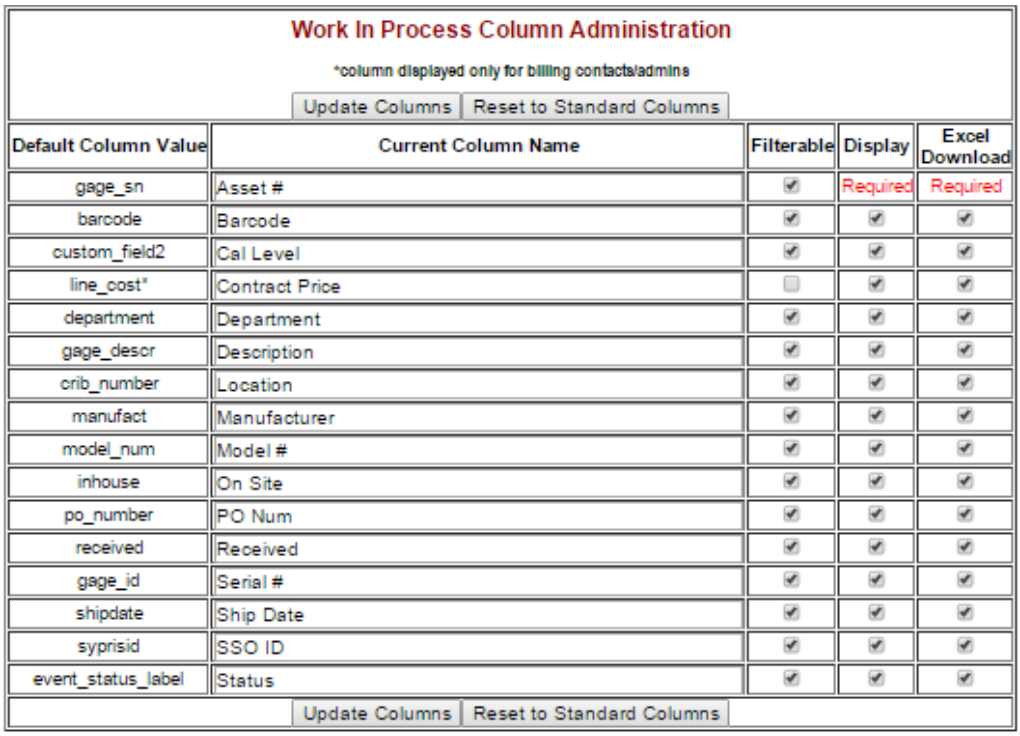


8.3 Work in Process Administration

8.3.1 Column Administration

The Work in Process Column Administration Screen allows a user to determine the names of the columns, and whether the columns should be displayed on the screen and in the excel download. It also allows the user to determine whether the field should have a filter in the Work in Process screen. The user should determine the configuration and then click on Update Columns. If the user wants the page to display the default view they should click on the Reset to Standard Columns.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



Work In Process Column Administration

*column displayed only for billing contacts/admins

Update Columns | Reset to Standard Columns

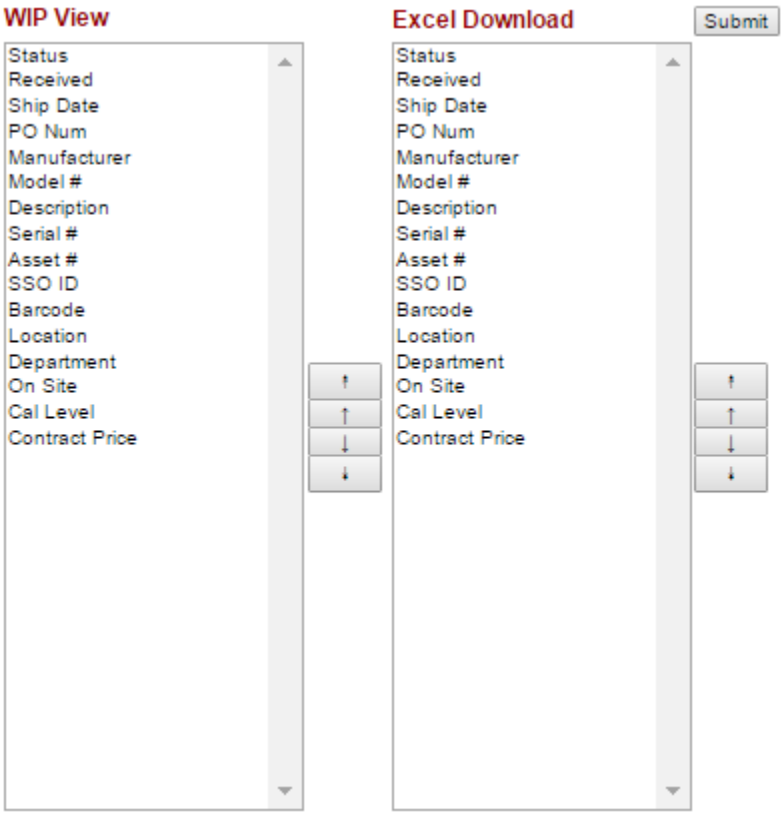
Default Column Value	Current Column Name	Filterable	Display	Excel Download
gage_sn	Asset #	☑	Required	Required
barcode	Barcode	☑	☑	☑
custom_field2	Cal Level	☑	☑	☑
line_cost*	Contract Price	☐	☑	☑
department	Department	☑	☑	☑
gage_descr	Description	☑	☑	☑
crib_number	Location	☑	☑	☑
manufact	Manufacturer	☑	☑	☑
model_num	Model #	☑	☑	☑
inhouse	On Site	☑	☑	☑
po_number	PO Num	☑	☑	☑
received	Received	☑	☑	☑
gage_id	Serial #	☑	☑	☑
shipdate	Ship Date	☑	☑	☑
syprisid	SSO ID	☑	☑	☑
event_status_label	Status	☑	☑	☑

Update Columns | Reset to Standard Columns

8.3.2 Column Order Administration

The Column Order Administration page will show as an option after the Work in Process List has been customized. This screen will allow a user to change the order of the columns in the Work in Process Screen and the Download to Excel using navigation arrows. Once the order has been established, the Submit button should be clicked to update the column order

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.4 Customer Managed Asset Administration

8.4.1 Column Administration

The Customer Managed Assets Column Administration Screen allows a user to determine the names of the columns, whether the columns should be displayed on the screen and in the excel download and the order of columns. It also allows the user to determine whether the field should have a filter in the Customer Managed Assets screen and whether it is editable for the Customer Supervisor edit role. The user should determine the configuration and then click on Update Columns. If the user wants the page to display the default view they should click on the Reset to Standard Columns.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

Customer Managed Assets View

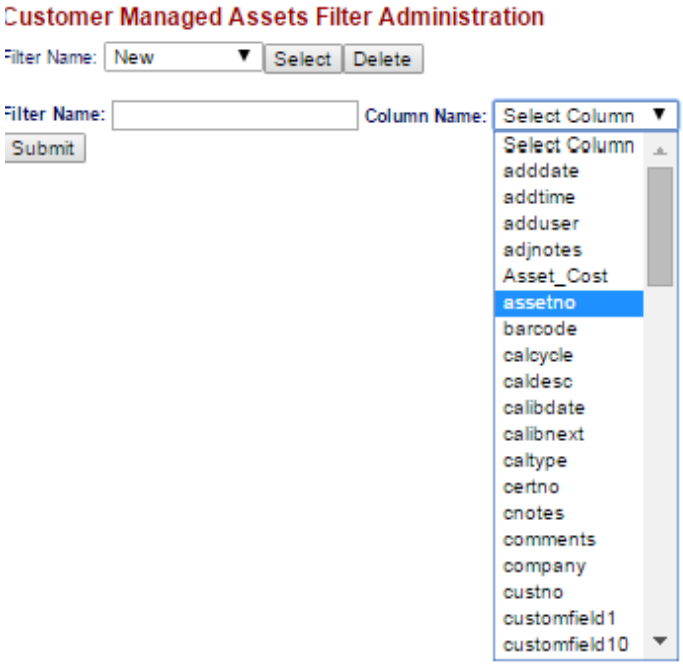
Update Columns | Reset to Standard Columns

Default Column Value	Current Column Value	Filterable	Column Order	Display	Customer Supervisor Edit	Excel Download	Custom Column
Location:	Location	☑	1	☑	☐	☑	☐
Department:	Department	☑	2	☑	☐	☑	☐
ID:	ID	☑	3	☑	☐	☑	☐
Barcode:	Barcode	☑	4	☑	☐	☑	☐
Calweb ID:	Calweb ID	☑	5	☑	☐	☑	☐
Equip ID:	Equip ID	☑	6	☑	☐	☑	☐
Cal Last:	Cal Last	☑	7	☑	☐	☑	☐
Cal Next:	Cal Next	☑	8	Required	☐	Required	☐
PM Last:	PM Last	☑	9	☑	☐	☑	☐
PM Next:	PM Next	☑	10	☑	☐	☑	☐
Manufacturer:	Manufacturer	☑	11	☑	☐	☑	☐
Model #:	Model #	☑	12	☑	☐	☑	☐
Asset #:	Asset #	☑	13	☑	☐	☑	☐
Description:	Description	☑	14	☑	☐	☑	☐
Serial #:	Serial #	☑	15	☑	☐	☑	☐

Update Columns | Reset to Standard Columns

8.4.2 View Filter Administration

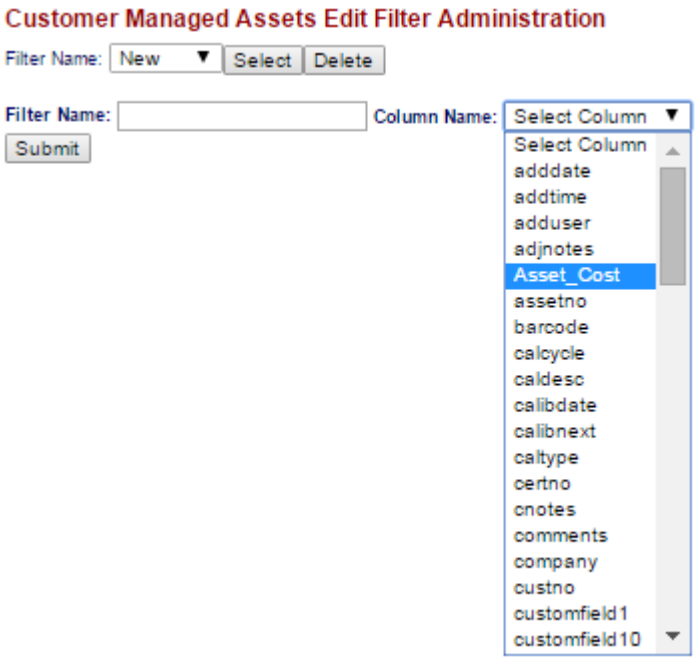
The View Filter Administration area allows a filter to be created to limit the assets viewed by a user based upon a certain value. It is available for the Customer Managed Asset view. The View Filter Administration area also allows existing filters to be modified. A list of fields is displayed in the Column Name dropdown. The Filter Name should then be entered. The filter will be created when the Submit button is clicked. After the Filter has been created, it will be available in the Customer Managed Asset View Filter Administration area of the customer's user accounts.



Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

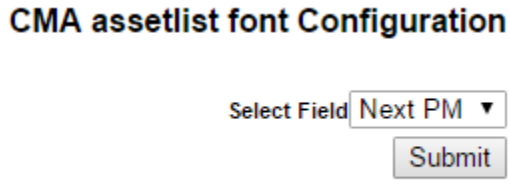
8.4.3 Edit Filter Administration

The Edit Filter Administration area allows a filter to be created to limit the assets editable by a user based upon a certain value. It is available for the Customer Managed Asset view. The Edit Filter Administration area also allows existing filters to be modified. A list of fields is displayed in the Column Name dropdown. The Filter Name should then be entered. The filter will be created when the Submit button is clicked. After the Filter has been created, it will be available in the Customer Managed Asset Edit Filter Administration area of the customer's user accounts.



8.4.4 CMA Font Setup

The CMA Font Setup allows users to determine whether the Red Overdue font on Customer Managed Assets will be based on the PM date or the Calibration Date. The user may select the field from the dropdown and click on the Submit button. The default view is based upon the calibration date.



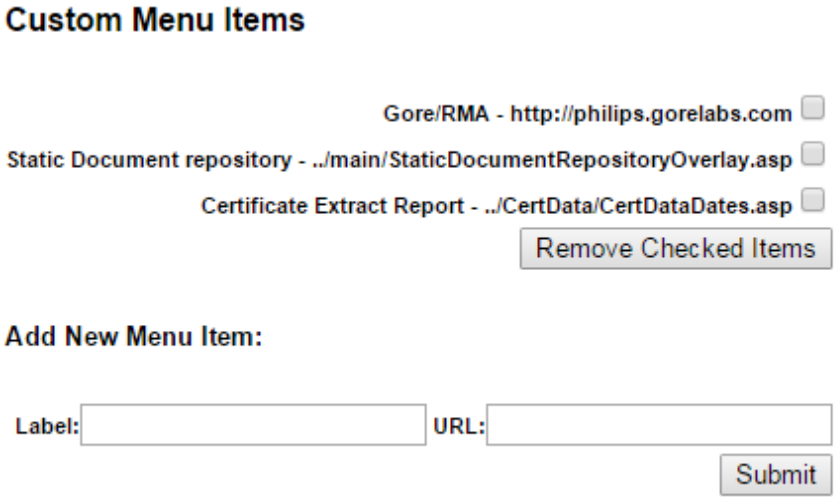
8.5 Customer Administration

8.5.1 Custom Menu Items

The Custom Menu Items area allows internal users to add links to the Custom Menu section of Calweb. The Custom Menu is viewable by navigating to Views>>Custom on the Calweb menu.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

In order to add a new menu item, the user will enter the name of the link into the Label textbox and then add the URL address for the page in the URL box. This page also allows the user to remove a menu item by checking the item they would like to remove and then clicking on the 'Remove Checked Items' button.



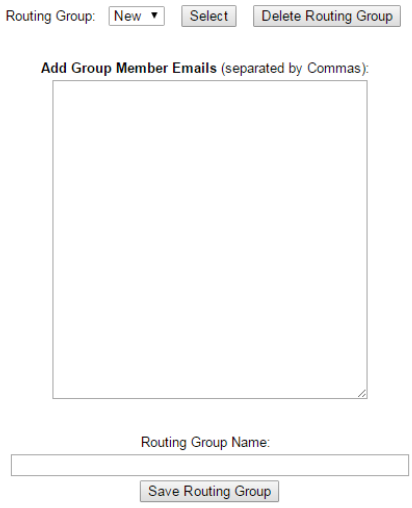
8.5.2 Progress Bar

The progress bar screen allows an internal user to select whether or not a progress notification will be displayed on the Tek Managed Asset and Service History screens.

8.5.3 Document Routing

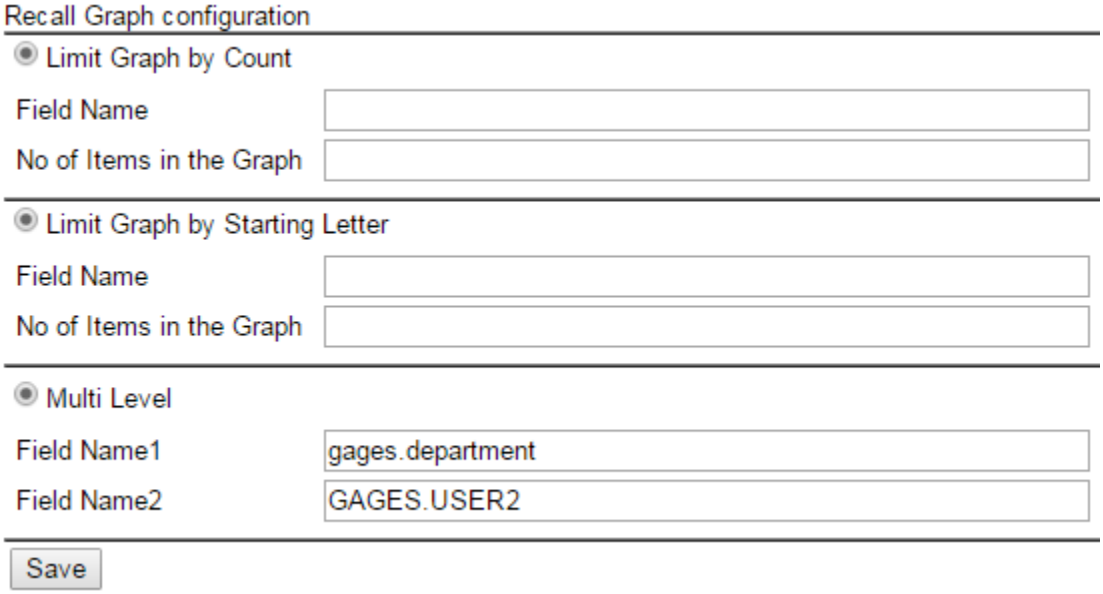
The Document Routing option allows an internal user to create a group for the Document Routing area. In order to create a group the user will select new in the Routing Group dropdown. The user will then add all of the member emails in the text area, separated the emails with commas. The user will then create a Routing Group Name and then click on the Save Routing Group button. In order to edit an existing group, the user will select the name of the group from the dropdown and then click the Select button. After they make the changes they will click on the Save Routing Group button. To delete a group, the user will select a group from the dropdown and then click on the 'Delete Routing Group' button.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.5.4 30 Day Recall Field

The 30 Day Recall Field screen allows users to set up the Zone Recall Status Graph. The graph can show the date by count or by the starting letter of the name. It can limit the number of items in the graph. It also allows users to select a single level or multi-graph. For example in the figure below, the graph will show the number of assets belonging to each user2 within a selected department.



8.5.5 Customer Message

The Customer Message Administration screen allows a user to add a message that will appear on the landing page for all users for a specific customer. The user will select a date range for the message to appear, type in the customer message and click on Submit. After the message is

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

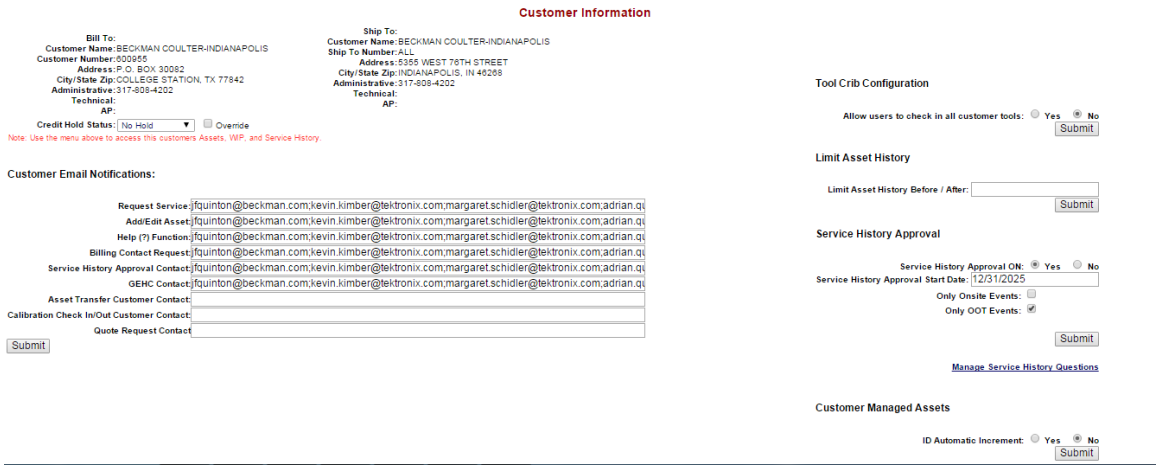
submitted, it will show up in the message history below. In the message history the user can delete comments or select a previous comment to use again by clicking on the message ID.

Welcome to the Calweb Website!
Attention:
ALL Calibration will be marked with the color coded label BLUE for the Month of SEPT.
Previous
Insert New Revision Item
NEWS
Just Released: CALWEB 9.9
Interactive Help Topics on CALWEB Start Page
EIS Delivery Dashboard
Enhanced Form Validation on Asset Edit Screen

8.6 Customer Info Screen

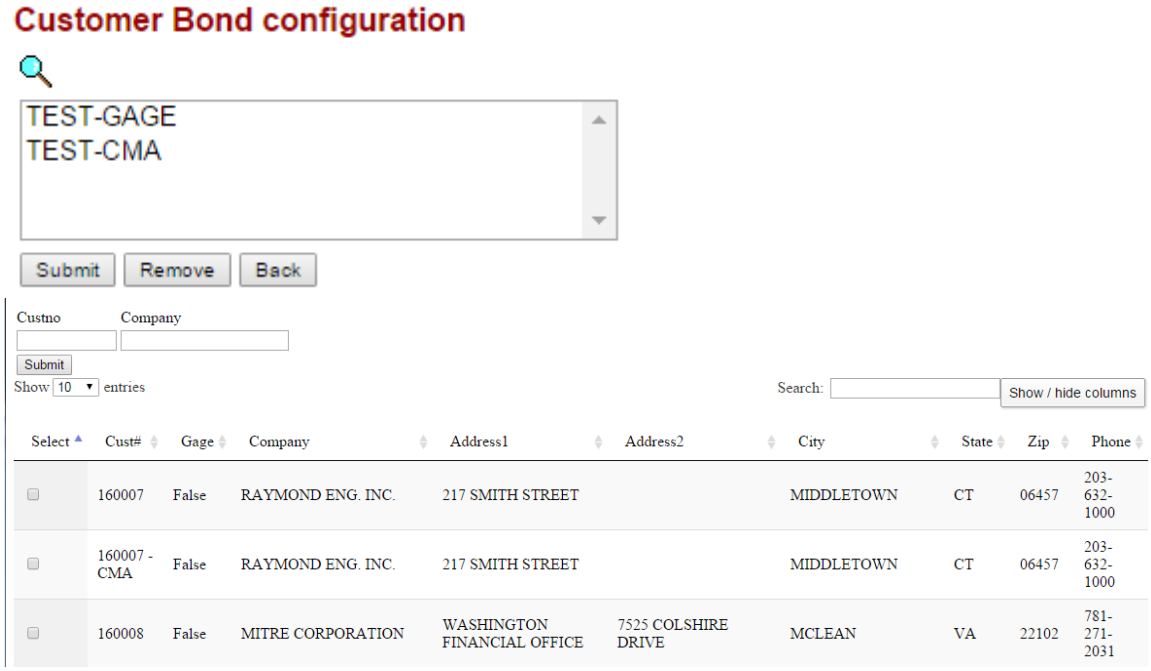
The Customer Info Screen allows administrators to set a variety of items for customers. These include setting email notifications for customers, tool crib configuration to allow users to check in only their tools or all customer tools, limiting the asset history dates, managing the Service History/OOT approval processes and configuring the Customer Managed Asset screen to automatically increment the asset number.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.



8.7 Bond Customer

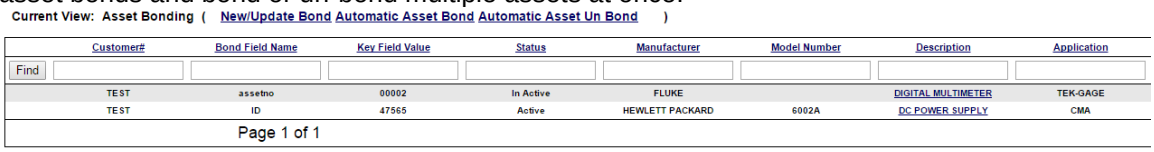
The Customer Bond configuration screen allows a user to select customers for which to bond assets. The user will click on the magnifying glass to select from a list of customers. The customer list is filterable and searchable. The user will check the checkboxes for the customers they want to bond.



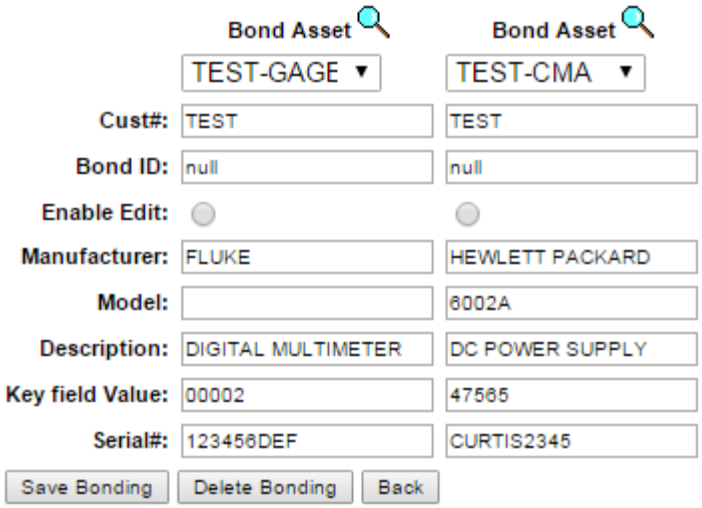
8.8 Bonded Assets

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

The Bonded Asset Screen allows users to view bonded assets, create and update individual asset bonds and bond or un-bond multiple assets at once.


Current View: Asset Bonding (New/Update Bond Automatic Asset Bond Automatic Asset Un Bond)
Customer# Bond Field Name Key Field Value Status Manufacturer Model Number Description Application
Find
TEST assetno 00002 In Active FLUKE DIGITAL MULTIMETER TEK-GAGE
TEST ID 47565 Active HEWLETT PACKARD 6002A DC POWER SUPPLY CMA
Page 1 of 1

The New/Update Bond Link allows a user to select two individual assets to bond. Clicking on the Magnifying glass will give the user a list of assets based on the customer/view combo that is selected. After the assets are selected, the user can click on Save Bonding to create the bond or Delete Bonding to delete an existing bond.



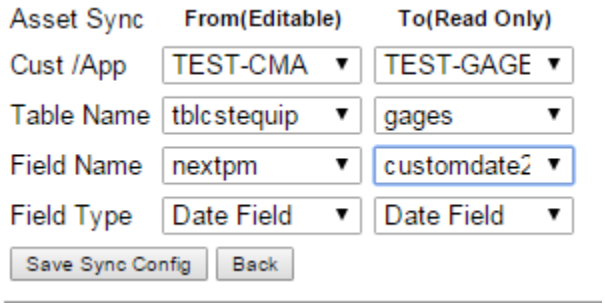
The Automatic Asset Bond and Automatic Asset Un-Bond allow a user to bond or un-bond based upon a specific field such as the asset number or serial number. The user will select Asset Number of Serial Number from the dropdown and click on Find. The results will display all matching assets based upon that field. The user will then click on the Bond Asset button to bond the assets. The Un-Bond process is completed with the same steps except the Un-Bond Asset button will be selected to complete the process.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

https://calweb.tek.com/AssetBond/autoassetbond.asp
Tektronix
CalWeb Version: 9.9 Try Our New Simple Asset Search!
********** INTERNAL USER **********
Impersonating Customer: TEST -- CUSTOMER NAME (Ship To: ALL)
Cassondra Wyatt
cassondra.wyatt@tektronix.com
HOME ACCOUNT VIEWS TOOL CRIB CAL CHECK IN REQUEST / HELP BULK UPLOAD CONFIG MGMT LOGOUT
CalWeb > CONFIG MGMT >Auto Asset Bond
Configured for Bond assets:
Select Databases:
TEST-GAGE TEST-CMA
Total Assets(TEST-GAGE):30
Total Assets(TEST-CMA):82
Assets can be automatically bonded based on:
Find Back
Customer# KeyFieldValue Asset# Serial# Manufacturer Model Number Description
TEST-GAGE 0003 0003 16578903 HUDICAKER DIGITAL
TEST-GAGE 1234 1234 1234 FLUKE PROCESSMETER
TEST-GAGE 123456 123456 12345 CURTIS TESTREPAIR PROCESSMETER
TEST-GAGE 15551 15551 7101 DICKSON TEMPERATURE RECORDER-
TEST-GAGE 4236 4236 7045090 DICKSON KTX TEMPERATURE RECORDER
TEST-GAGE 4237 4237 7052122 DICKSON TEMPERATURE RECORDER
TEST-GAGE 45678 45678 45678 FLUKE POWER QUALITY ANALYZER
TEST-GAGE 536522 536522 test FLUKE BIOMEDICA TEST
TEST-GAGE AMD KB2G-42-6111-0 AMD KB2G-42-6111-0 test TEST TEST TEST
TEST-GAGE CURTIS CURTIS testing CURTIS DMM
TEST-GAGE CURTIS1234 CURTIS1234 CURTIS1234 FLUKE 87 III DIGITAL MULTIMETER
TEST-GAGE CURTIS2 CURTIS2 CURTIS2 FLUKE 435 PROCESSMETER
TEST-GAGE CURTIS2345 CURTIS2345 CURTIS2345 HEWLETT PACKARD DC POWER SUPPLY
TEST-GAGE CURTIS4 CURTIS4 FLUKE PROCESSMETER
TEST-GAGE CURTISEXCEL CURTISEXCEL 000273 BAPCO UNIVERSAL SAFETY TESTER
TEST-GAGE ETS20 ETS20 WIKA (GORE) 0 - 3 PSI PRESSURE GAUGE (GORE)
TEST-GAGE INDYSOFT TEST INDYSOFT TEST MEGGER MIT400 SITEMASTER PRECISION LOAD
TEST-GAGE INDYSOFT5 INDYSOFT5 MEGGER MIT400 INSULATION TESTER
TEST-GAGE INDYSOFTEST INDYSOFTEST 7101503 DICKSON KTX TEMPERATURE RECORDER
7:14 PM
9/28/2015

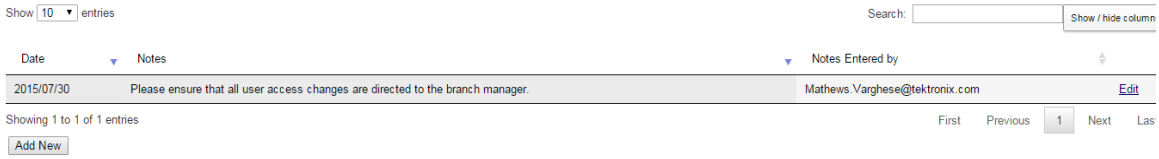
8.9 Bonded Assets Sync Configuration

The Bonded Assets Sync Configuration allows a user to select which field in a bond may be editable and update the other asset field. In the example below, the user may edit the next pm date in the Customer Managed Assets and it will automatically update the customdate2 field display in the Tek Managed Asset list.



8.10 Customer Special Instructions

The Customer Special Instructions screen allows internal users to see instructions that are specific to the customer. An example of this would be if a customer wants all changes to user accounts to go through a specific person.

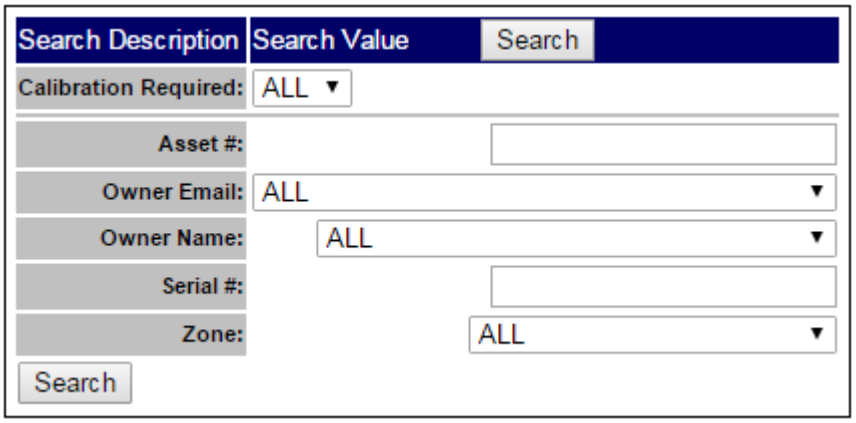


Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

9.0 Simple Asset Search

The Simple Asset Search allows a user to search Tek Managed Assets using specific criteria. This screen is accessible through the Calweb Start Page via the 'Simple Asset Search' link or through the menu bar via 'Views >>Simple Asset Search'.

To search for an asset you may select your criteria and click on the 'Search' button. You will be redirected to the 'Tek Managed Assets' page with the filtered results.



10.0 Document Routing

The document routing section allows a document to be uploaded and routed through a number of users for approval. The document can then be attached to an asset, if desired. After approved the document will be archived for viewing.

New Document

To start the document routing process, click on the 'New Document' link. Add a description for the file and then browse to the file location and click the 'Submit Attachment' button. The document will then be routed to 'In Progress Documents.'

In Progress Documents

The In Progress Documents will show any document that has started the routing process but has not been approved yet. The user may click on the File Description Hyperlink to view the document. Under the Action heading, the user may choose whether to Edit, Route, Approve/Reject or Delete the attachment. When the Delete button is clicked the document is deleted from the repository. There is also a link to an Audit Trail of the routing process.

Edit Screen

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

The Edit functionality will allow the user to edit the description or switch the file and description.

Routing Screen
The Routing button allows the user to assign users for approval. They can select the users that need to approve the document, the order of approval and whether to notify the user via email.

Audit Trail
The audit trail shows any changes made to the document including edits and approvals. The user can click the Send Audit Trail button to receive an email containing the audit trail.

Approval/Rejection Area
In the Approval/Rejection area of CalWeb, a user can approve or reject the document. This area includes a description of the file, who created it, when it was modified, a link to the file and a notes section. Rejected Documents will be placed in the 'In Progress' queue. Approved documents will be accessible by the 'Approved Documents' link.

Approved Documents Section
In the approved document section the user can click on the link under description to view the document, click on the audit trail button to view the audit trail, attach a document to an asset or archive the document.

Attaching the document to an asset
To attach the document to an asset, select asset number, SSO ID or serial number and type the corresponding value into the textbox. Once 'Save' had been selected the attachment is added to the asset. You may view the attachment by going into the asset detail and clicking on the 'Attachments' link.

11.0 Attaching Documents

Documents may be uploaded to Customer Managed Assets, Tek Managed Assets, or the Static Document Repository. For Tek Managed Assets they may be uploaded and attached to an asset or certificate.

Customer Managed Assets
To add a document to a Customer Managed Asset, the user must have edit rights enabled.
The user will select an asset from the customer managed asset list and navigate to the asset detail screen. To attach an asset the user will click on the edit button to go to the edit asset screen. On the asset edit screen the user can go to the attachment section, browse to the attachment and upload. The user may also select a picture to upload and be displayed on

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.

the asset detail page. On the asset detail screen the user will be able to view any attachments added to the asset.

Tek Managed Assets

To add a document to a Tek Managed Asset, the user must have edit rights and attachment rights enabled. The user can add an attachment to the certificate or the asset number.

Certificate Attachment

To add the attachment to a certificate, the user will navigate to the Service History Page, select the certificate number and then click on the attachment link. This will take the user to the Certificate Attachment page. The user can add up to five attachments at a time. The user will browse to the document, add a description and click on the Submit Attachment button. To view/edit/delete an attachment, the user will click on the attachment link and navigate to the Certificate Attachment Page.

Asset Number Attachment

To add the attachment to an asset number or view an attachment, the user will navigate to the Asset Detail Page and click on the 'Attachments' link. The user will then be directed to the Asset Number Attachment page. On this page there is a list of viewable attachments as well as an 'Add/Edit/Delete Attachments' link to Add, Edit or Delete the Attachment. To add, edit or delete an attachment, the user will click the link and be directed to the Asset Number Attachment repository.

Static Document Repository

The static document repository allows users to add/view/delete documents for a customer. To navigate to the repository the user will go to 'Views >> Custom >> Static Document Repository' in the menu area. In this area the user can add up to five documents. The user may also edit or delete the documents.

Confidential
This manual is proprietary of Tektronix Service Solutions. Tektronix Service Solutions has all rights to modify, update, and distribute this manual.